

# Continuous Intellectual Property Process

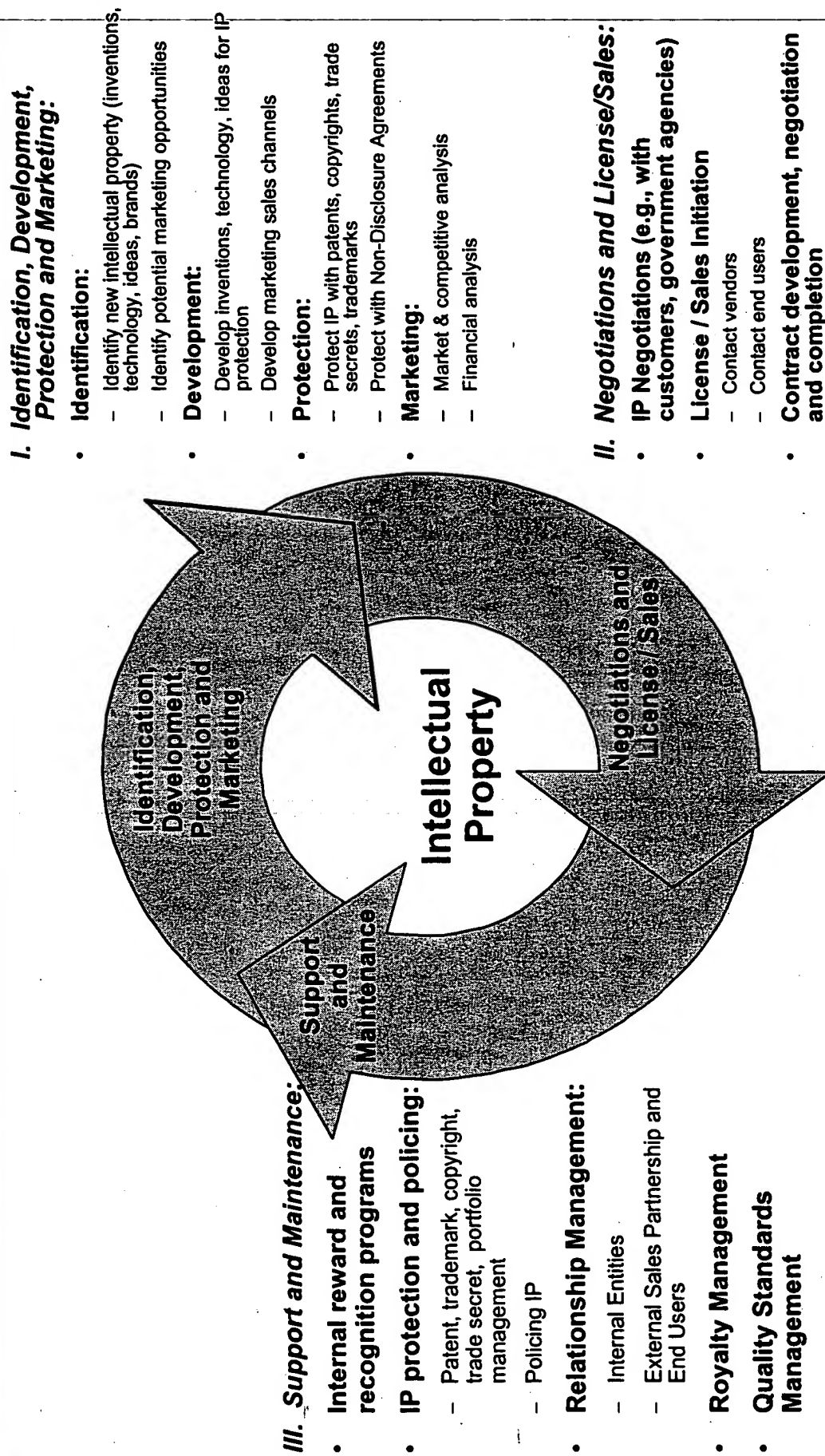
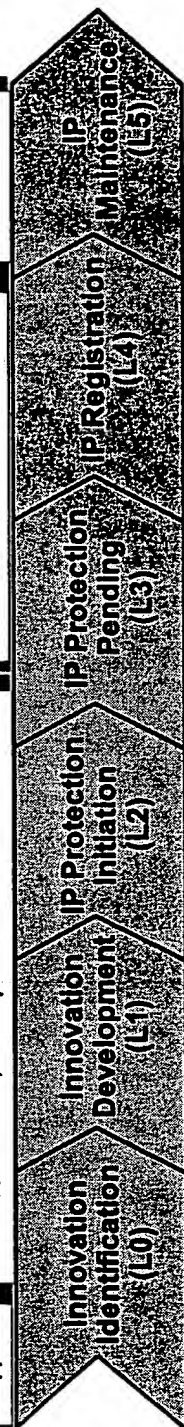


FIG. 1

## Maintenance



**Effort Spent:** • 1-2 hours/product

- 3-5 hours/patent
- 1-2 hours/1-2 hours/trademark
- 1 hour/copyright

**Time Elapsed (per level):** • 1-5 days

- 1-5 days/patent
- 1-5 days/trademark
- 1-5 days/copyright

**Time Elapsed (total):** • <1 week

- 2-2.5 years/patent
- 1-3.5 yrs/trademark
- 3-4 months/copyright
- 20 years/patent
- 5-10 years/trademark
- 10 years/copyright

**Note:** Trade secrets need not be registered, but reasonable steps must be taken to keep secret, including proper markings and use of Non-Disclosure Agreements.

### IP Protection Activities:

- |   |   |  |  |  |  |
|---|---|--|--|--|--|
| <ul style="list-style-type: none"> <li>Internal awareness and education</li> <li>Internal relationship building</li> <li>Identify protection opportunities</li> <li>Identify type of protection(s) needed</li> <li>Catalog and qualify opportunities</li> <li>Notification to IP Marketing for marketing</li> <li>IP Protection team member assigned</li> </ul> | <ul style="list-style-type: none"> <li>Further educate innovation generator on information needed for IP protection</li> <li>Assist innovation generator in getting innovation to point for protection with IP</li> <li>Assist IP Marketing with technical understanding</li> <li>Disclosure form received</li> <li>Clearance Searches</li> </ul> | <ul style="list-style-type: none"> <li>Assess disclosure form</li> <li>Notification to IP Protection legal</li> <li>Verify disclosure award received (if any)</li> <li>Follow up with innovation generator and legal</li> <li>Application filed</li> </ul> | <ul style="list-style-type: none"> <li>Verify filing award received (if any)</li> <li>Assist innovation generator with issues relating to using innovation while IP protection pending</li> <li>Follow up with legal regarding status</li> <li>Review written documents from government agency where application filed &amp; assist in response</li> </ul> | <ul style="list-style-type: none"> <li>Assist in notification to innovation generator</li> <li>Assist innovation generator in marking innovation with registration information</li> <li>Assist innovation generator in understanding extent of IP protection</li> <li>Verify registration</li> </ul> | <ul style="list-style-type: none"> <li>Verify issuance award received (if any)</li> <li>Record all relevant IP information</li> <li>Internal follow up</li> <li>IP policing</li> </ul> |
|---|---|--|--|--|--|

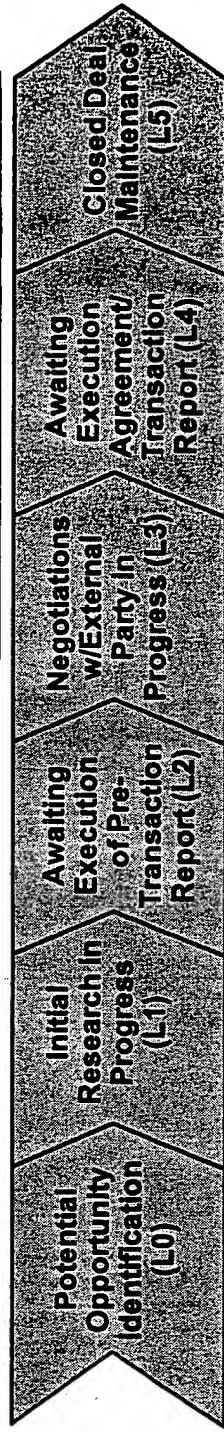
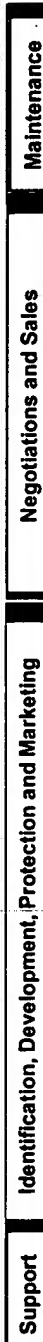
**Measures:**

- | IP attributes cataloged  | Registration   | Proper innovation usage during IP   | Proper markings   | IP attributes cataloged  |
|--|--|---|---|--|
| <ul style="list-style-type: none"> <li>• IP attributes cataloged</li> </ul>  | <ul style="list-style-type: none"> <li>• # Registration</li> <li>• Proper markings</li> </ul>                          | <ul style="list-style-type: none"> <li>• Proper innovation usage during IP</li> <li>• Pendency</li> </ul>   | <ul style="list-style-type: none"> <li>• # Applications filed</li> <li>• Quality of applications</li> </ul> | <ul style="list-style-type: none"> <li>• # Disclosures</li> <li>• Innovation attributes known and cataloged</li> </ul> |
| <ul style="list-style-type: none"> <li>• Innovations identified (#/types)</li> <li>• Quality of innovations</li> </ul> | <ul style="list-style-type: none"> <li>• # Disclosures</li> <li>• Innovation attributes known and cataloged</li> </ul> | <ul style="list-style-type: none"> <li>• # Applications filed</li> <li>• Quality of applications</li> </ul> | <ul style="list-style-type: none"> <li>• # Registration</li> <li>• Proper markings</li> </ul>               | <ul style="list-style-type: none"> <li>• IP attributes cataloged</li> </ul>  |

**FIG. 2**

# IP Marketing Life Cycle

## Continuous IP Process:



### Effort Spent:

#### Time Elapsed (per level):

#### Time Elapsed (total):

### IP Marketing Activities:

<ul style="list-style-type: none"> <li>• 1-5 days</li> <li>• 1-2 hours/product</li> <li>• &lt;1 week</li> </ul>	<ul style="list-style-type: none"> <li>• 7-10 days</li> <li>• 5-10 hours/product</li> <li>• 1-2 weeks</li> </ul>	<ul style="list-style-type: none"> <li>• 7-10 days</li> <li>• 5-10 hours/deal</li> <li>• 2-3 weeks</li> </ul>	<ul style="list-style-type: none"> <li>• 1-5 months</li> <li>• 10-50 hours/deal</li> <li>• 2-6 months</li> </ul>	<ul style="list-style-type: none"> <li>• 7-10 days</li> <li>• 1-2 hours/deal</li> <li>• 2-6 months</li> </ul>	<ul style="list-style-type: none"> <li>• 1 day + ongoing</li> <li>• 1-2 hours/deal +</li> <li>• 2-6 months</li> </ul>
<ul style="list-style-type: none"> <li>• Internal awareness and education</li> <li>• Internal relationship building</li> <li>• Identify potential marketing opportunities</li> <li>• Catalog and qualify potential opportunities</li> <li>• Notification to IP Protection for disclosure</li> <li>• IP Marketing team member assigned</li> </ul>	<ul style="list-style-type: none"> <li>• Begin market research</li> <li>• Follow-up interview with SME</li> <li>• Begin product scorecard research</li> <li>• Assess competitive environment</li> <li>• Initial valuation of product</li> <li>• Prioritize product within portfolio</li> <li>• Make Go-No Go decision</li> <li>• Begin to get internal buy-in</li> <li>• Draft &amp; submit PTR</li> </ul>	<ul style="list-style-type: none"> <li>• Conduct in-depth interview with SME &amp; continue to build relationship</li> <li>• Begin channel strategy</li> <li>• Continue competitive research and valuation of product</li> <li>• Initiate contact with chosen sales partners/end users</li> <li>• Utilize NDAs</li> <li>• Protect IP prior to disclosing (when possible)</li> </ul>	<ul style="list-style-type: none"> <li>• Continue product valuation, market research, &amp; channel strategy</li> <li>• Create product overview presentation (external)</li> <li>• Determine structure &amp; pricing of deal</li> <li>• Begin and complete negotiations / contracts</li> <li>• Draft &amp; submit Transaction Report</li> </ul>	<ul style="list-style-type: none"> <li>• Finalize fine points of contract</li> <li>• Manage technical and logistic issues of product</li> </ul>	<ul style="list-style-type: none"> <li>• Sign contracts</li> <li>• Record all relevant product information</li> <li>• Record all relevant deal information</li> <li>• Track royalties</li> <li>• Sales partner / end user relationship management</li> <li>• Internal follow up</li> <li>• Quality standards management</li> <li>• IP policing</li> </ul>

### Measures:

<ul style="list-style-type: none"> <li>• Products identified</li> <li>• Quality of products</li> </ul>	<ul style="list-style-type: none"> <li>• Product attributes known &amp; cataloged</li> </ul>	<ul style="list-style-type: none"> <li>• PTR for all deals</li> </ul>	<ul style="list-style-type: none"> <li>• Accuracy of valuations</li> <li>• Terms of deals</li> <li>• # times contract reworked</li> </ul>	<ul style="list-style-type: none"> <li>• TR for all deals</li> </ul>	<ul style="list-style-type: none"> <li>• Revenues</li> <li>• % licensed with patent protection</li> <li>• Deal attributes cataloged</li> </ul>
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FIG. 3

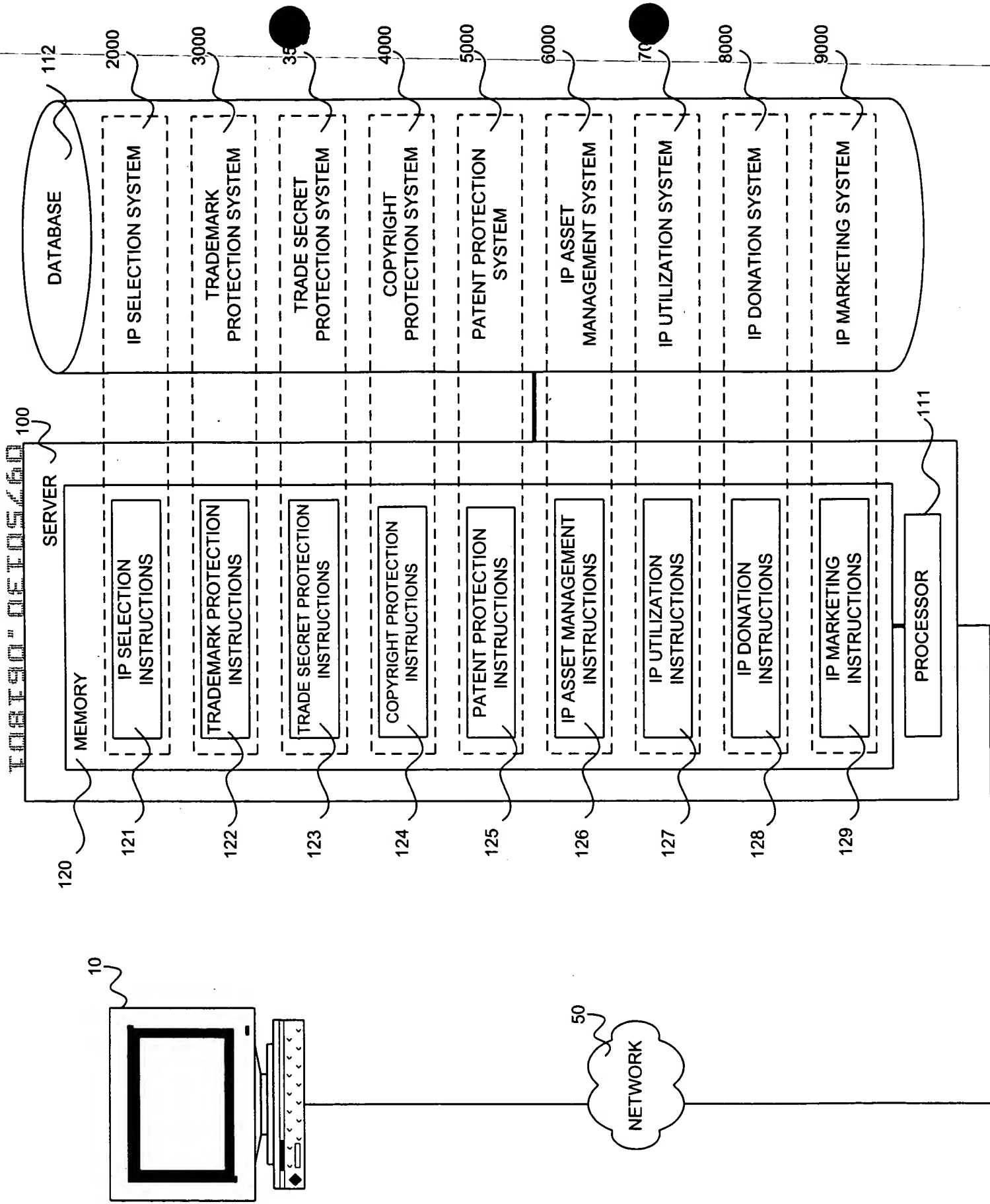


FIG. 4



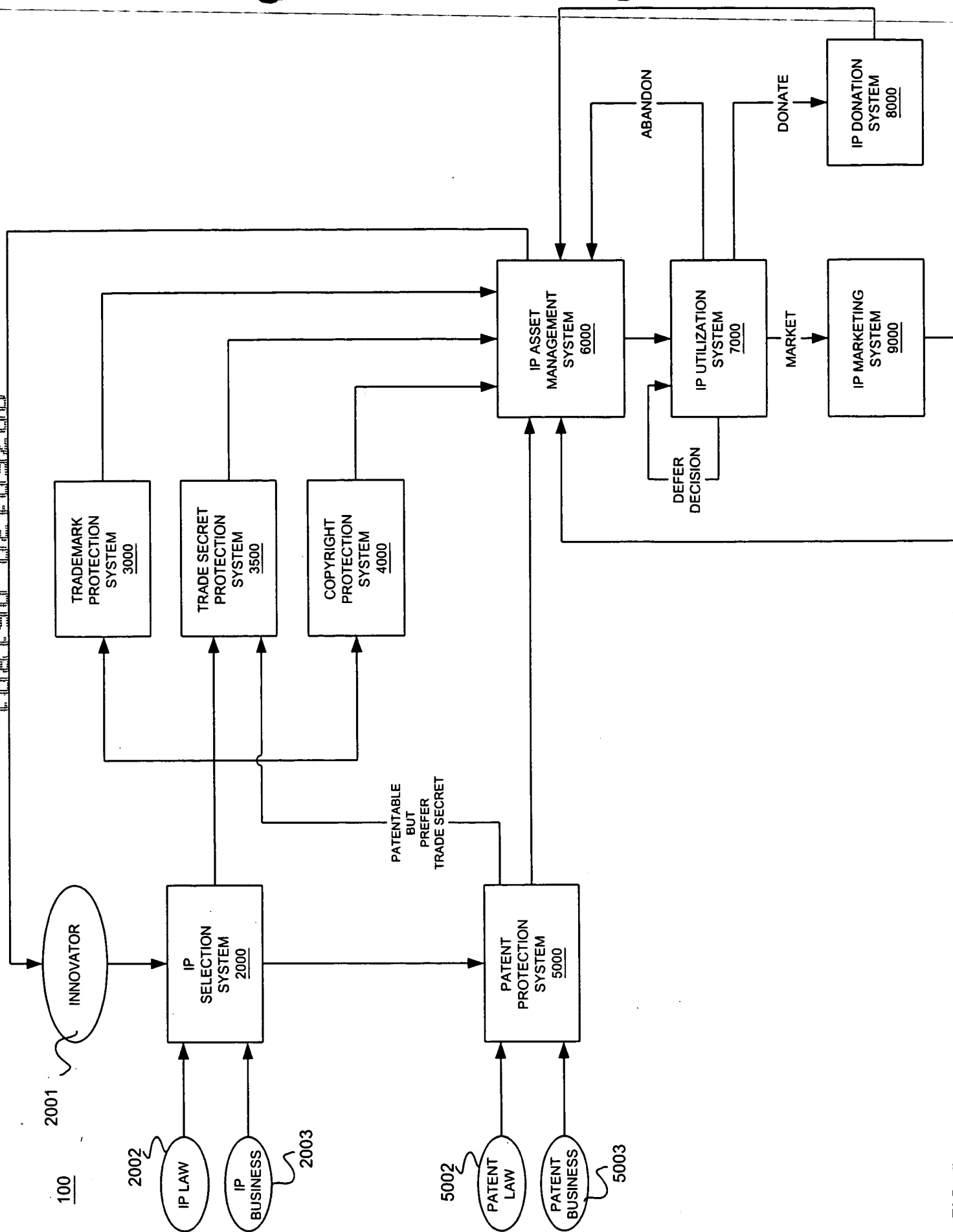
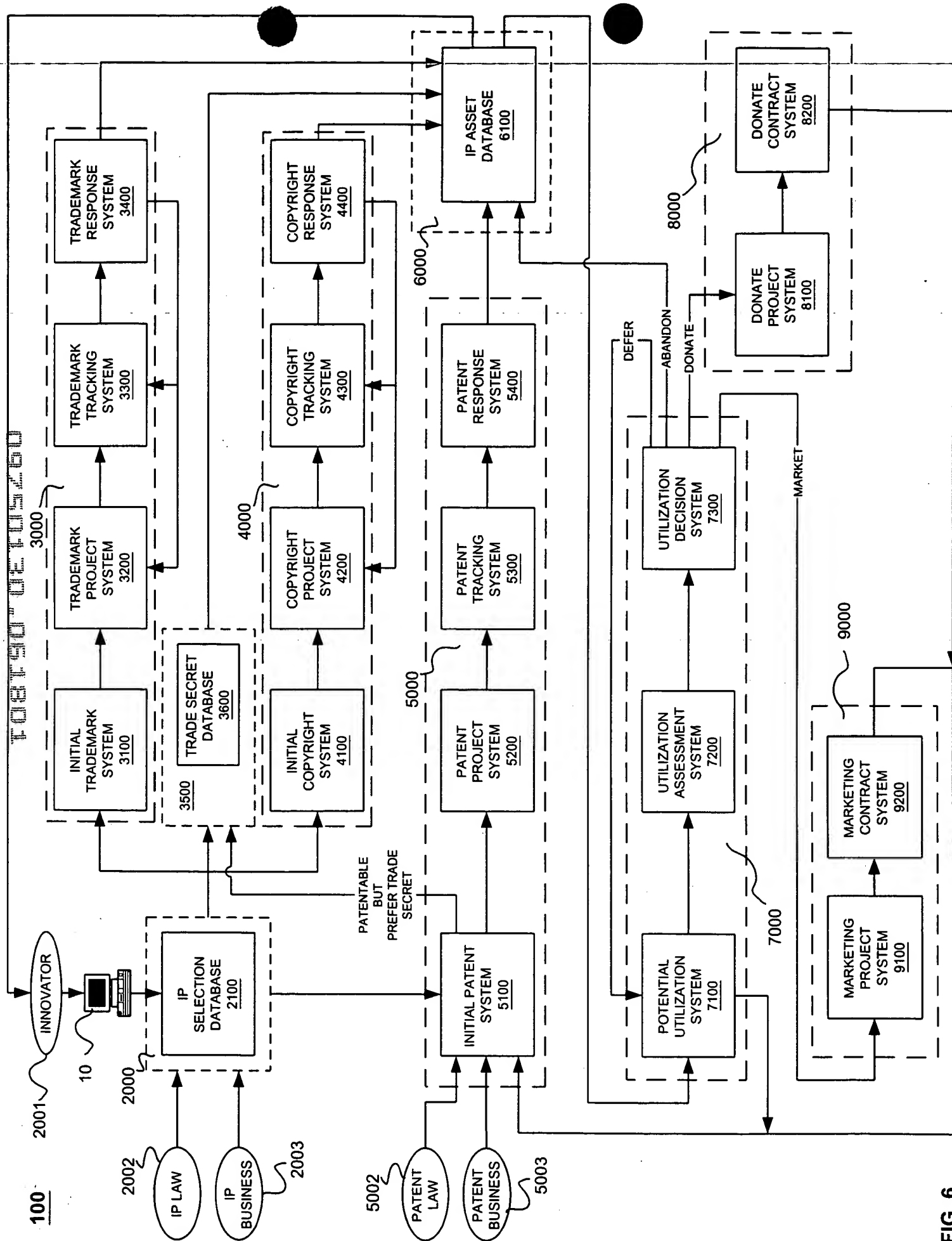
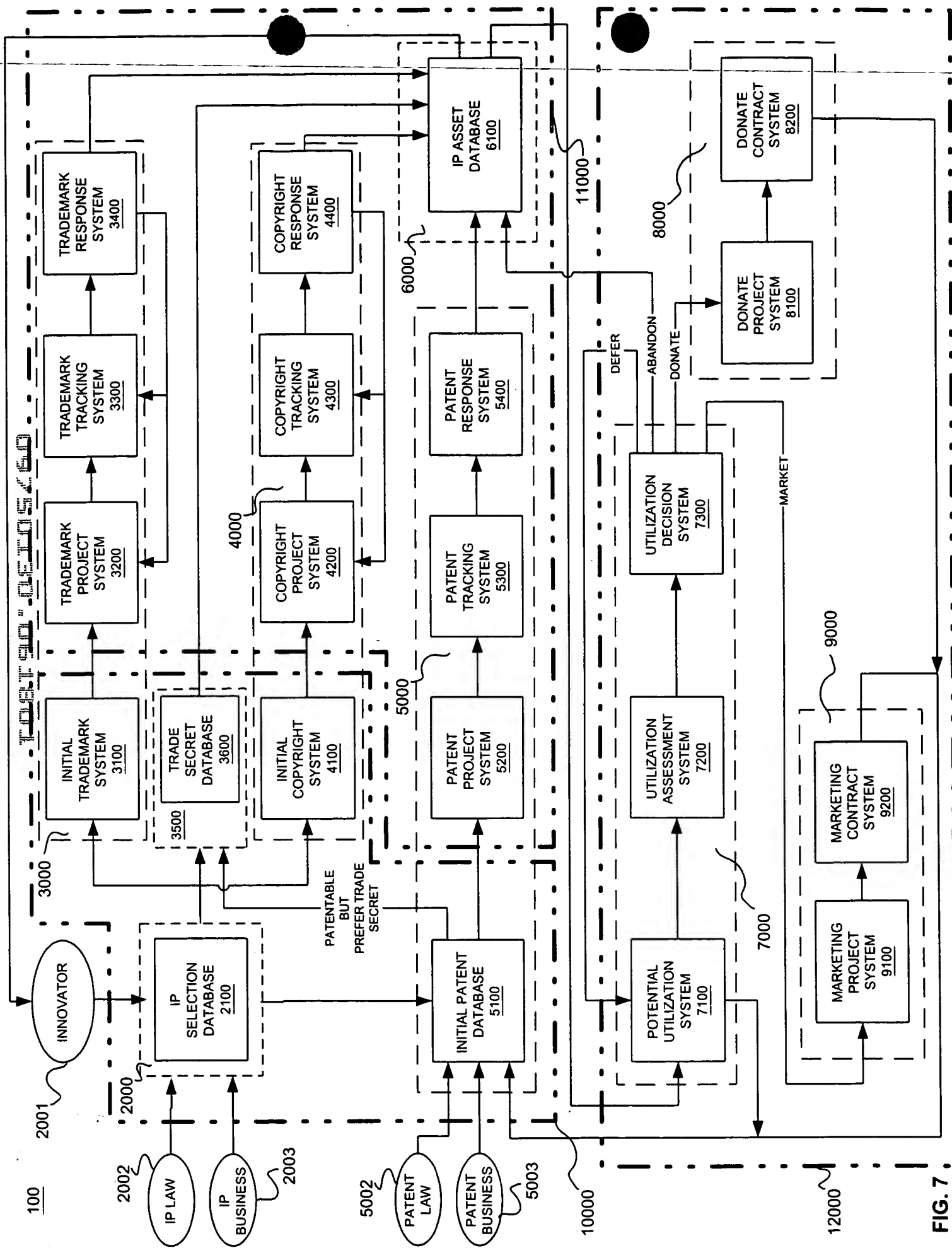


FIG. 5



**FIG. 6**



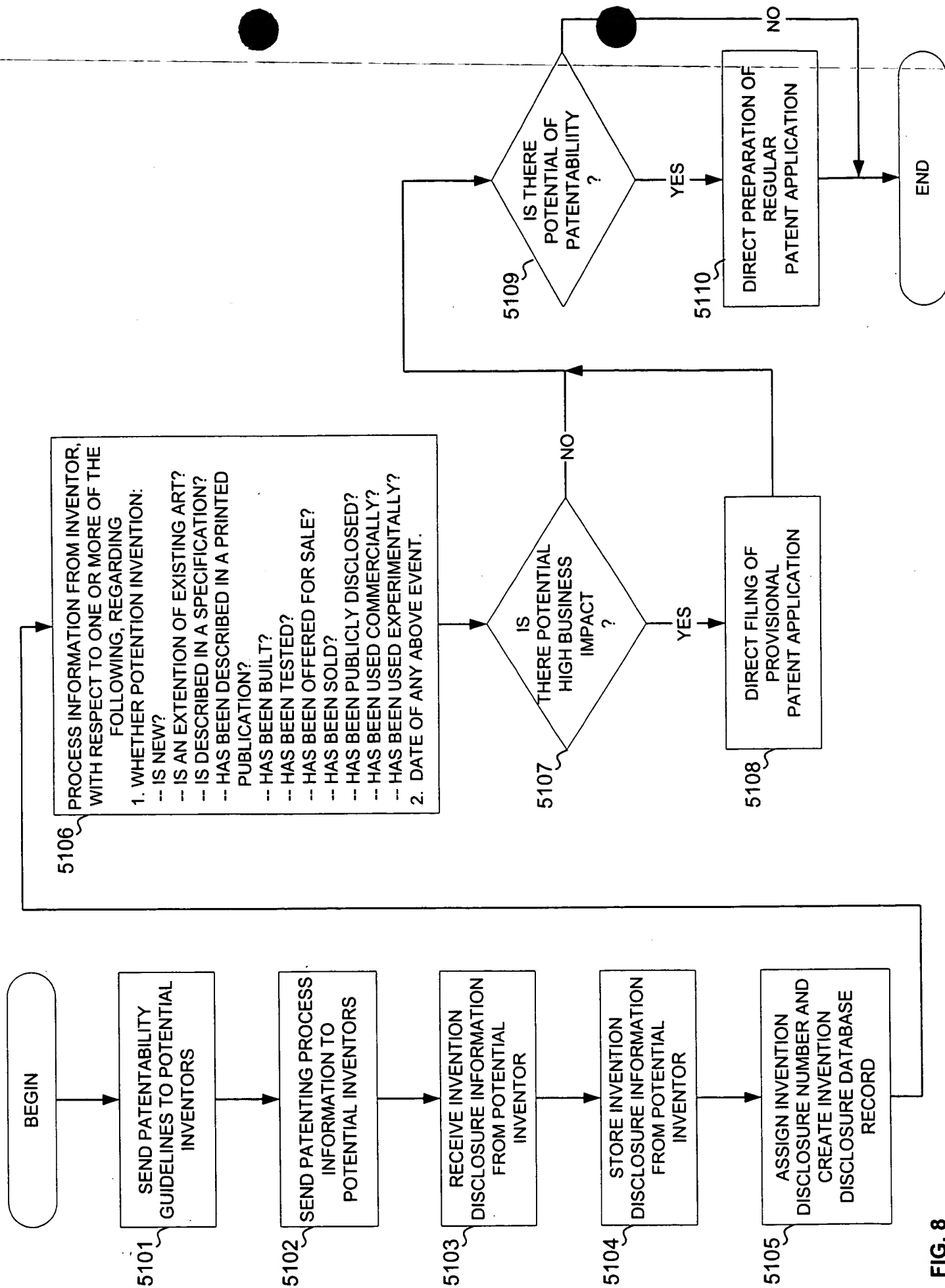


FIG. 8

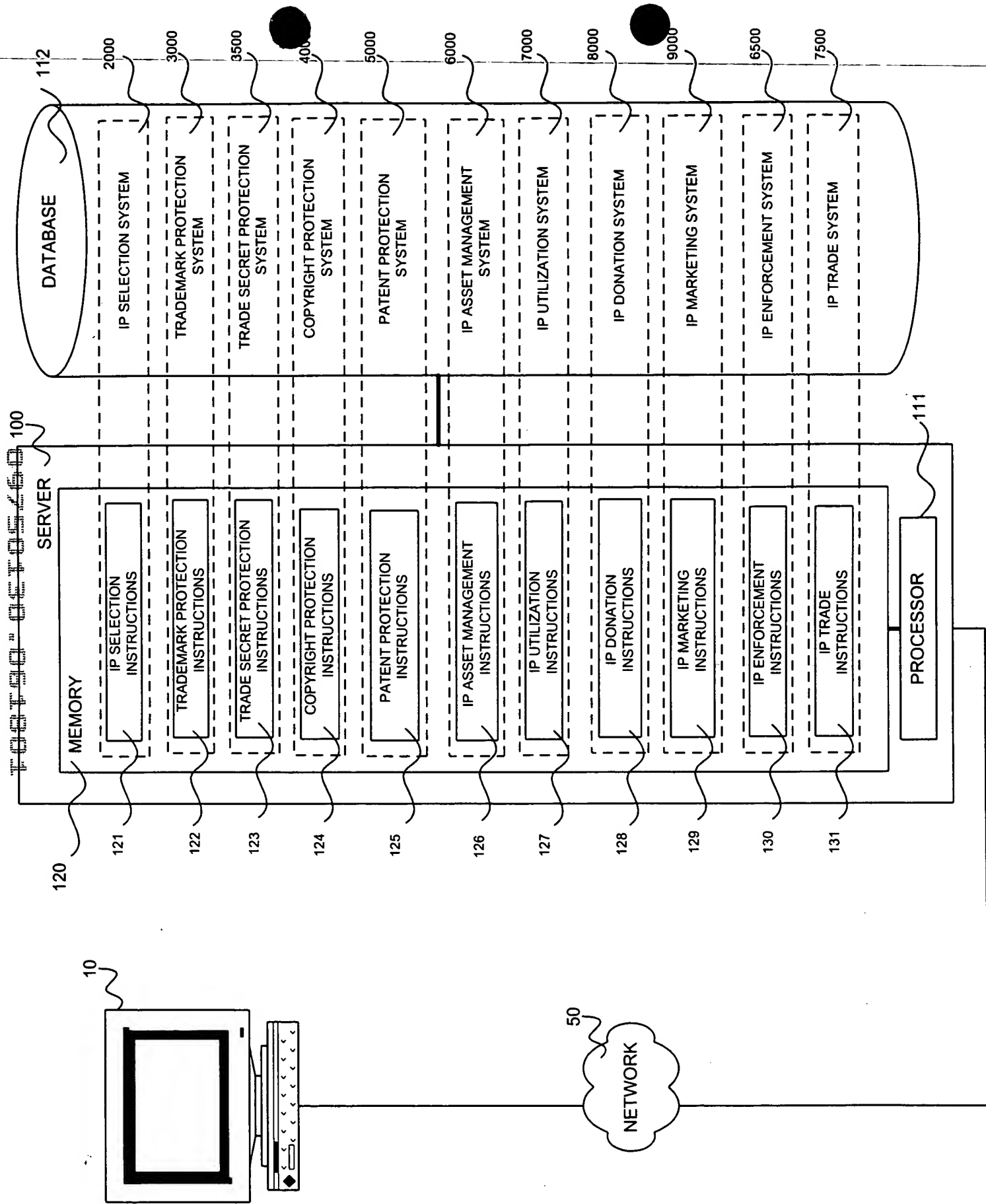


FIG. 9

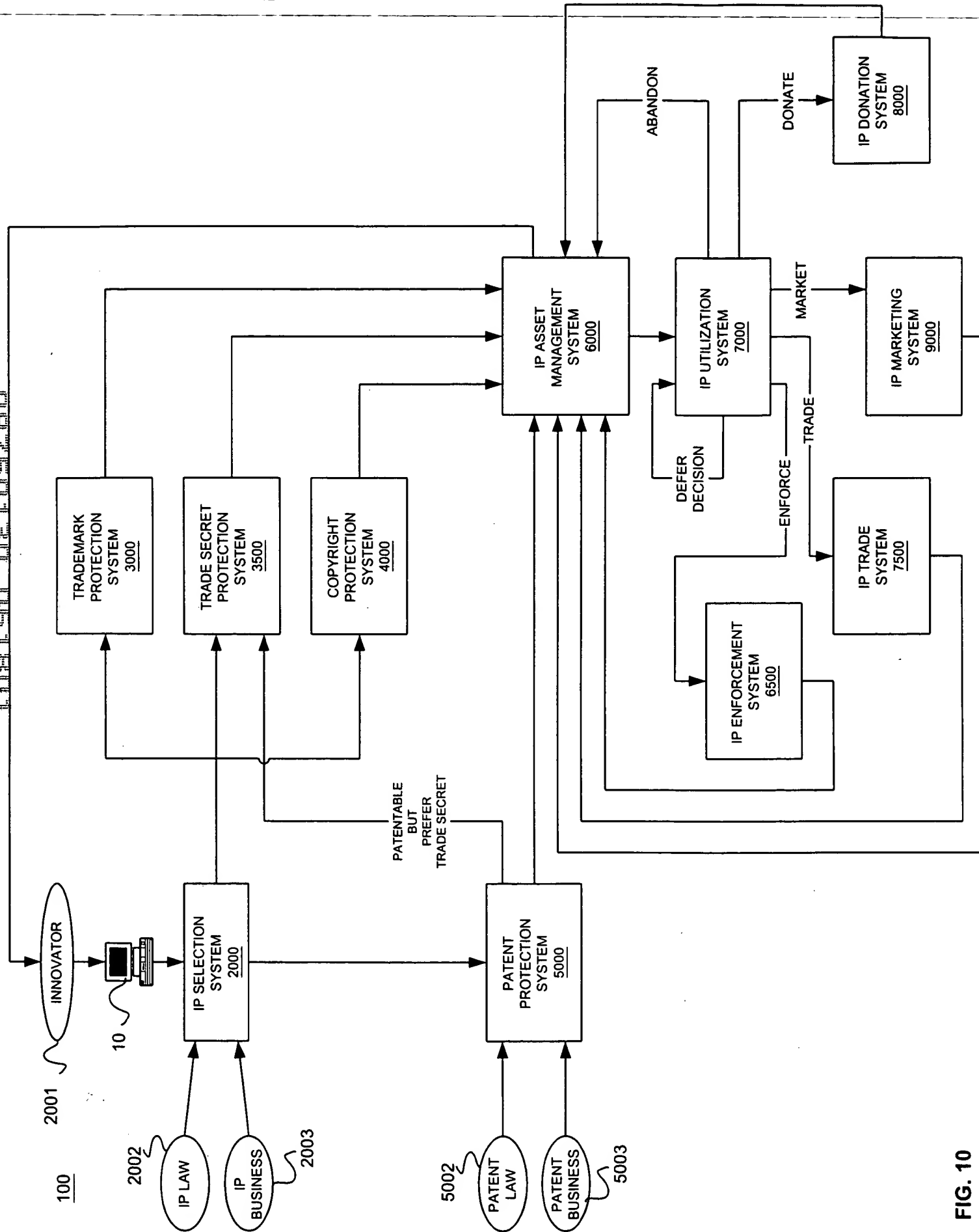


FIG. 10

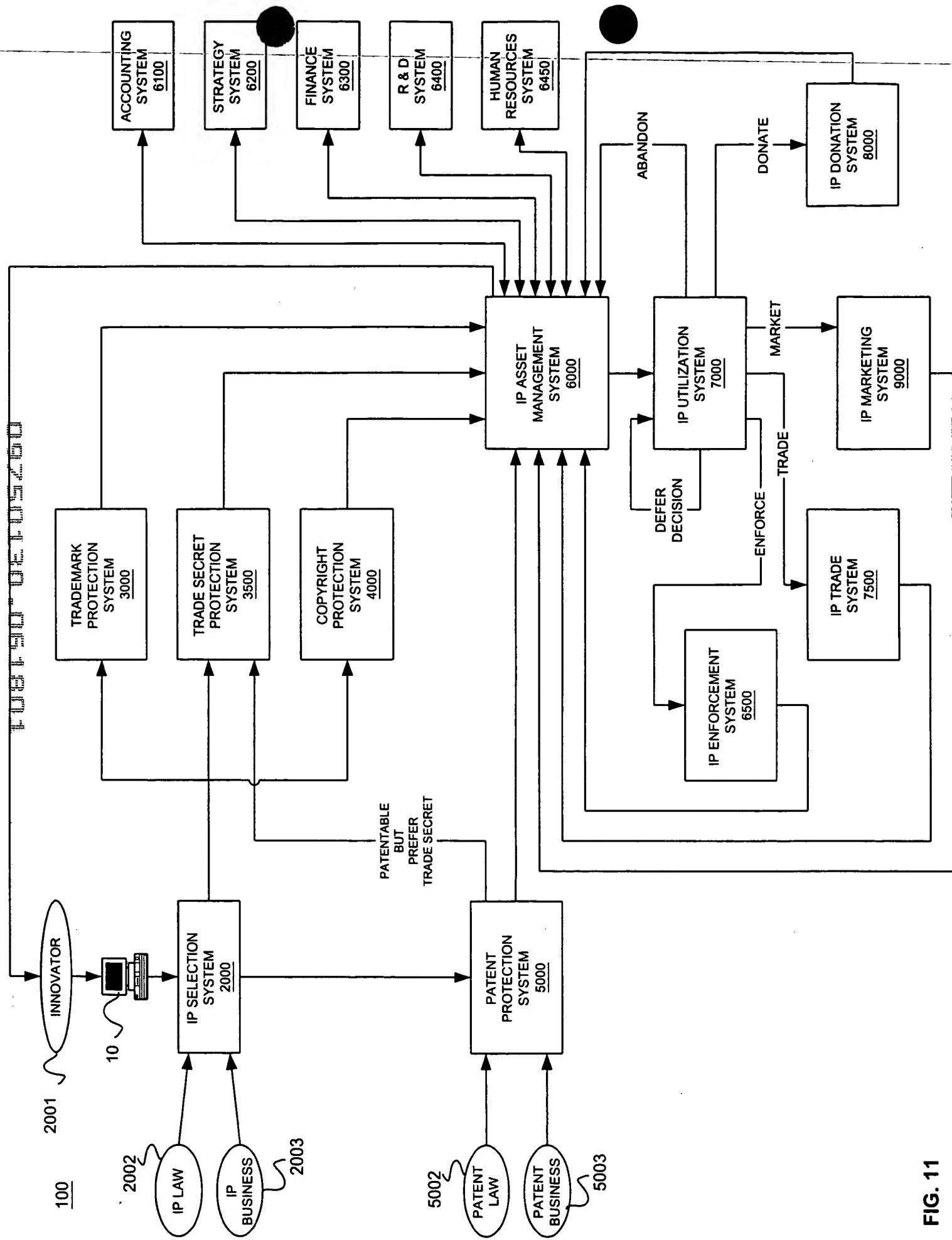


FIG. 11



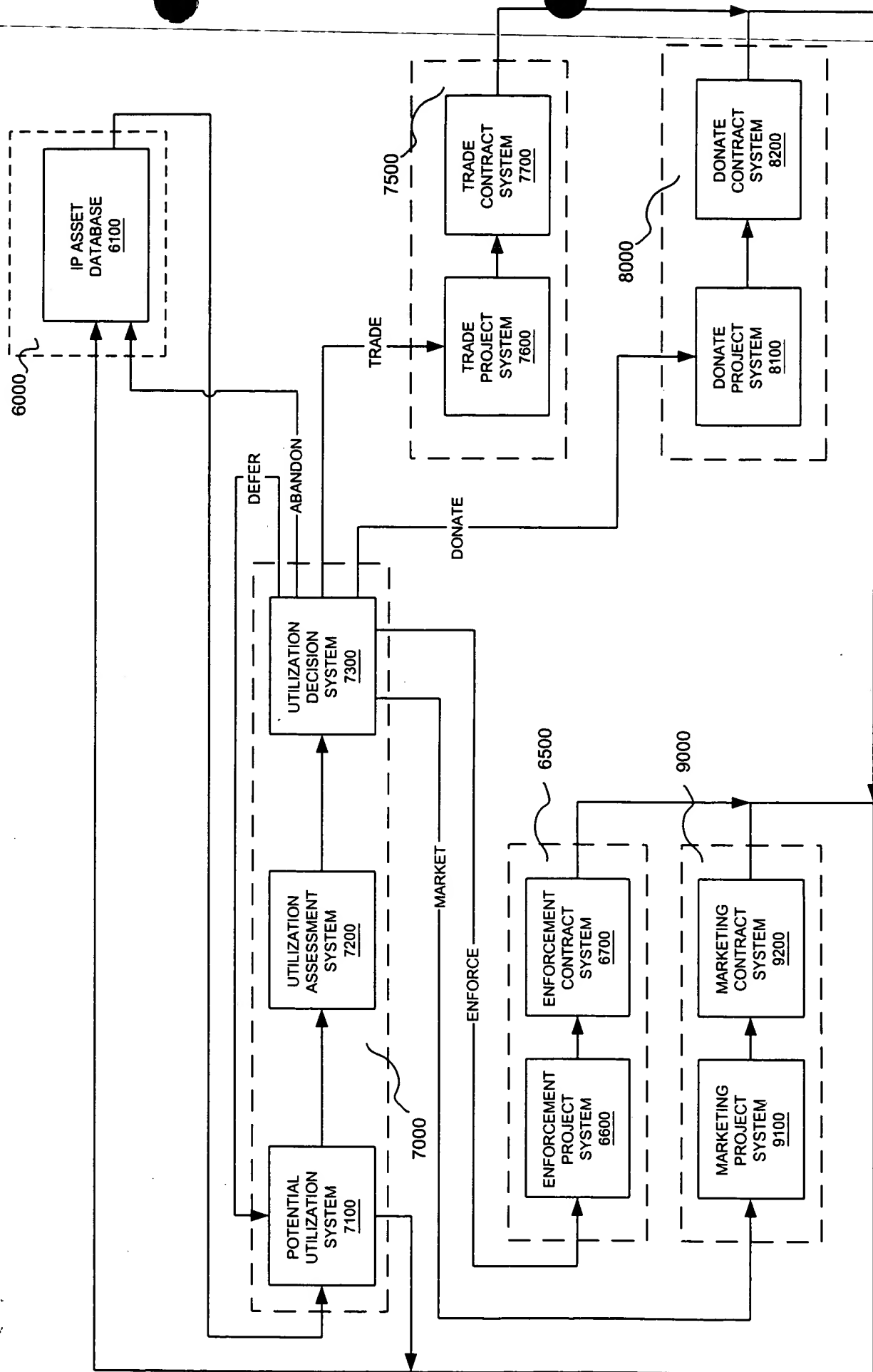


FIG. 12

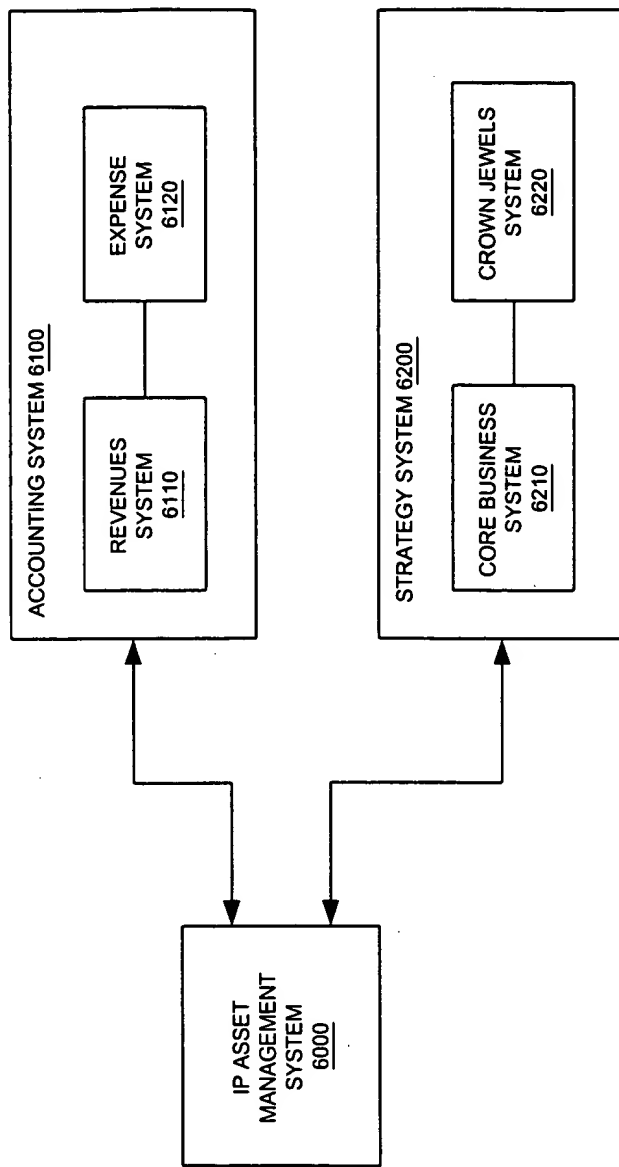


FIG. 13

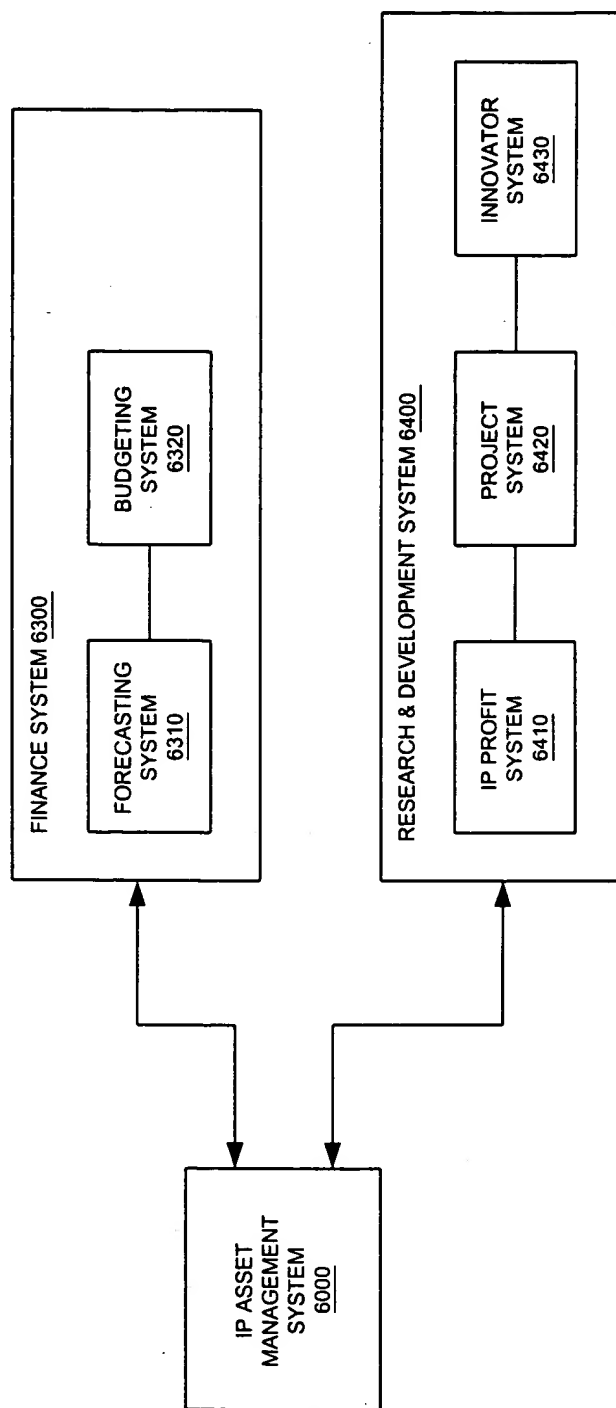


FIG. 14

	PRODUCT	B/U	LEAD	L1	L2	L3	L4	L5	L6	L7	L8	L9	L10	GOAL	\$	%	
1	PRODA	BUB	X						42					2001	3.5M	0.5	
2	PRODB	BUC	Z										45	4Q 00	1M	0.9	
3	PRODC	BUA	Z				35							4Q 00	3.5M	0.25	
4	PRODD	BUA	Y					35						4Q 00	3.5M+	0.5	
5	PRODE	BUD	X					35						4Q 00	3.5M	0.05	
6	PRODF	BUE	W					35									
7	PRODG	BUD	W		35												
8	PRODH	BUC	X					35						2001	500K		
9	PRODI	BUE	Z						35					2001			
10	PRODJ	BUE	X					40						2001	5M	0.33	
11	PRODK	BUB	W								47			2001	6M	0.9	
12	PRODL	BUD	Y	31X										-----	-----	-----	
13	PRODM	BUB	Y					35									
14	PRODN	BUA	W				38							2001			
15	PRODO	BUC	Y	36X										-----	-----	-----	
				INITIAL RESEARCH	MARKET RESEARCH	PTR APPROVAL	MARKET PLAN	SELL	NEGOTIATE	TR APPROVAL	EXECUTE CONTRACT	SETUP CONTRACT	AUDIT CONTRACT				

FIG. 15

	PRODUCT	B/U	LEAD	L1	L2	L3	L4	L5	L6	L7	L8	L9	L10	GOAL	\$	%
1	PRODF	BUE	W					35								
2	PRODG	BUD	W		35											
3	PRODK	BUB	W								47			2001	6M	0.9
4	PRODN	BUA	W				38							2001		
5	PRODA	BUB	X						42					2001	3.5M	0.5
6	PRODE	BUD	X					35						4Q 00	3.5M	0.05
7	PRODH	BUC	X					35						2001	500K	
8	PROD J	BUE	X					40						2001	5M	0.33
9	PRODD	BUA	Y					35						4Q 00	3.5M+	0.5
10	PRODL	BUD	Y	31X										-----	-----	-----
11	PROD M	BUB	Y					35								
12	PRODO	BUC	Y	36X										-----	-----	-----
13	PRODB	BUC	Z										45	4Q 00	1M	0.9
14	PRODC	BUA	Z				35							4Q 00	3.5M	0.25
15	PRODI	BUE	Z						35					2001		
				INITIAL RESEARCH	MARKET RESEARCH	PTR APPROVAL	MARKET PLAN	SELL	NEGOTIATE	TR APPROVAL	EXECUTE CONTRACT	SETUP CONTRACT	AUDIT CONTRACT			

FIG. 16

PRODUCT	B/U	LEAD	L1	L2	L3	L4	L5	L6	L7	L8	L9	L10	GOAL	\$	%
1	PRODB	BUC	Z									45	4Q 00	1M	0.9
2	PRODK	BUB	W							47			2001	6M	0.9
3	PRODA	BUB	X					42					2001	3.5M	0.5
4	PRODI	BUE	Z					35					2001		
5	PRODD	BUA	Y				35						4Q 00	3.5M+	0.5
6	PRODE	BUD	X				35						4Q 00	3.5M	0.05
7	PRODF	BUE	W				35								
8	PRODH	BUC	X				35						2001	500K	
9	PRODM	BUB	Y				35								
10	PRODJ	BUE	X				40						2001	5M	0.33
11	PRODC	BUA	Z			35							4Q 00	3.5M	0.25
12	PROD N	BUA	W			38							2001		
13	PRODG	BUD	W												
14	PRODL	BUD	Y	31X									----	----	----
15	PRODO	BUC	Y	36X									----	----	----

INITIAL RESEARCH	MARKET RESEARCH	PTR	APPROVAL	MARKET PLAN	SELL	NEGOTIATE	TR	APPROVAL	EXECUTE	CONTRACT	SETUP	CONTRACT	AUDIT	CONTRACT
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FIG. 17

FIG. 18

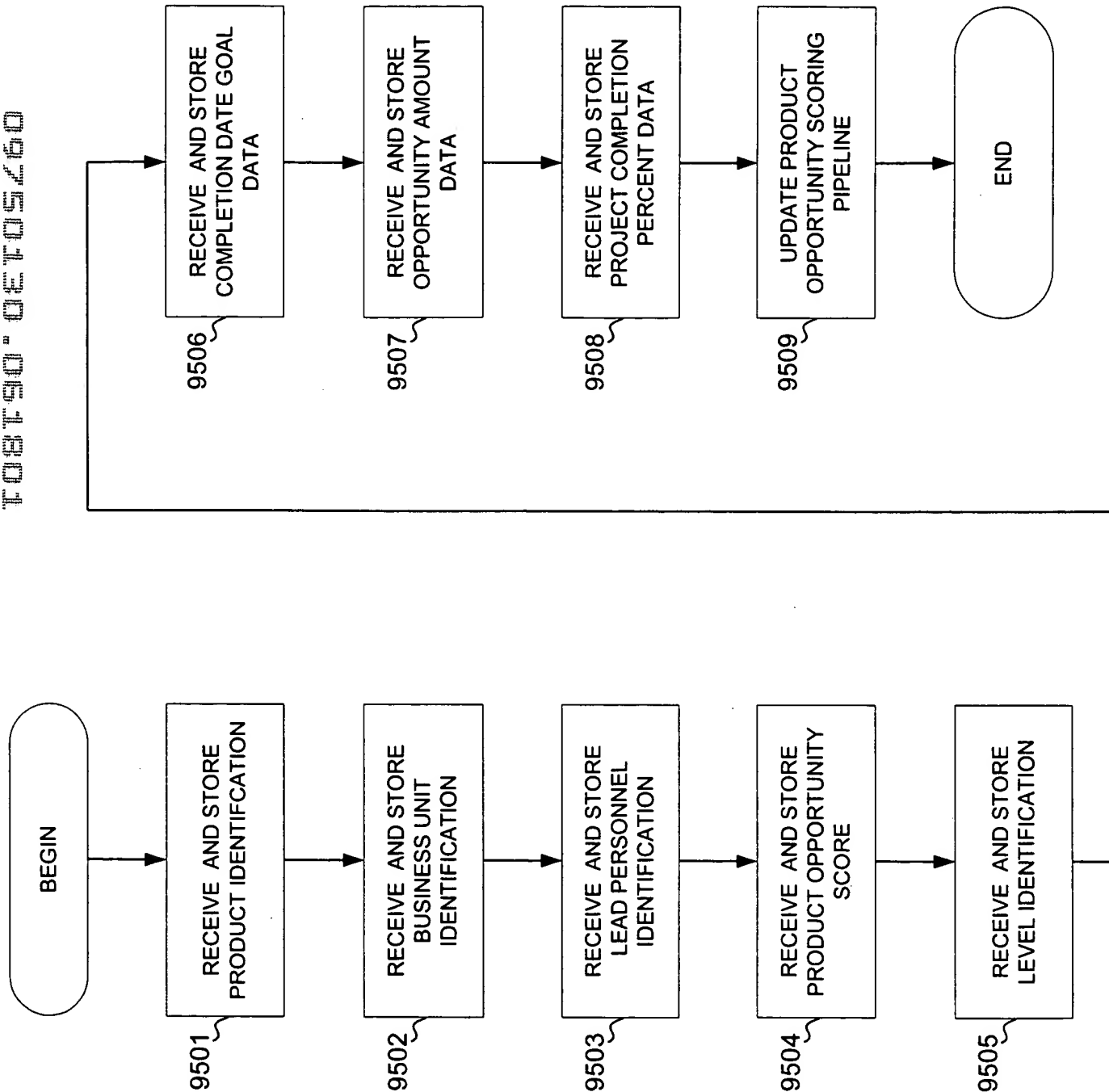


FIG. 18



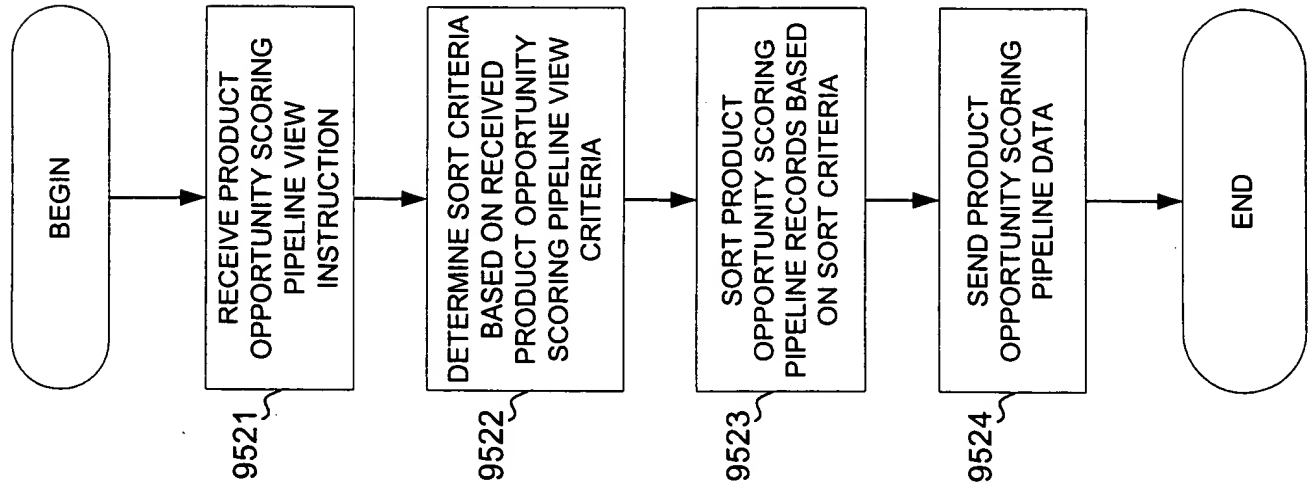


FIG. 19

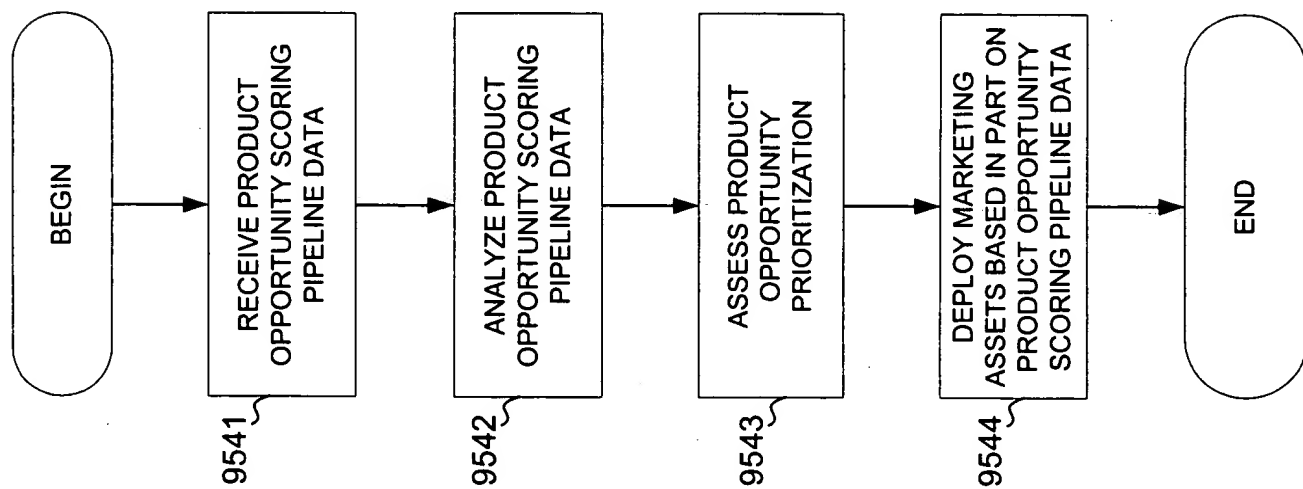


FIG. 20

# Intellectual Property Development, Marketing and Maintenance Database System

## IP Marketing Database - Tables

Table	Description
Companies	Table of companies
Marketing Opps	Table of IP marketing opportunities

## IP Marketing Database - Companies Table

Field Name	Data Type	Description
Formal Name	Text	Mailstop

## IP Marketing Database - Marketing Opps Table

Field Name	Data Type	Description
Opp #	AutoNumber	
Status	Text	
Estimated Mktg Date	Date/Time	
Product/Project Name	Text	
Product Group	Text	
Product Type	Text	
Type of IP Involved	Text	
BellSouth Entity	Text	
BellSouth Contacts	Memo	
BIRMAN Contact1	Text	
BIRMAN Contact2	Text	
BIRMAN Contact3	Text	
BIRMAN Contact4	Text	
Mktg Participant Name	Text	
Mktg Participant Address1	Text	
Mktg Participant Address2	Text	
Mktg Participant City, State,	Text	
Mktg Participant Contacts	Memo	
Mktg Participant Type	Text	
Deal Size	Text	
Estimated Deal Range	Text	
Estimated Deal Value	Text	
Priority	Text	
Description of Opportunity	Memo	
Background of Deal	Memo	
Financial Analysis	Memo	
Competitive Analysis	Memo	
Status of Deal	Memo	
Anticipated Timelines	Memo	
Pre-Trans Approval Person	Text	
Pre-Trans BellSouth Co	Text	
Title of Pre-Trans Approver	Text	
Date Pre-Trans Approved	Date/Time	
Final Bus Approval Person	Text	
Final Bus Approver's BellSouth	Text	
Title of Final Bus Approver	Text	
Date Final Bus Approved	Date/Time	
Final Legal Approval Person	Text	
Final legal Approver's BellSouth	Text	
Title of Legal Bus Approver	Text	

FIG. 21

Date Legal Bus Approved	Date/Time	
Follow-Up Date	Date/Time	
Follow-Up Needed	Memo	
Patent Status	Text	
IT Platform	Memo	
Level 1 Date	Date/Time	
Level 2 Date	Date/Time	
Level 3 Date	Date/Time	
Level 4 Date	Date/Time	
Level 5 Date	Date/Time	
Sub-entity	Text	
Top25	Yes/No	
<b>IP Marketing Database - Queries</b>		
<b>Queries</b>		<b>Description</b>
CoAlphaSort		
Level 0 WIP Report		
Level 1 WIP Report		
Level 2 WIP Report		
Level 3 WIP Report		
Level 4 WIP Report		
Level 5 WIP Report		
Marketing Opps Query		
Most Recent New Deals		
Opportunity Summaries - Specify 1 Entity Only		
Report by Entity-Specify 1 Entity Only		
Top 25 Report		
<b>IP Marketing Database - Forms</b>		
<b>Forms</b>		<b>Description</b>
Marketing Opps		
<b>IP Marketing Database - Reports</b>		
<b>Reports</b>		<b>Description</b>
Deal Overview by Vendor		
Level 0 WIP Report		
Level 1 WIP Report		
Level 2 WIP Report		
Level 3 WIP Report		
Level 4 WIP Report		
Level 5 WIP Report		
Most Recent New Deals		
Opportunity Summaries - ALL		
Opportunity Summaries - Specify 1 Entity Only		
Report by Entity - All		
Report by Entity-Specify 1 Entity Only		
Sales Funnel by Status		
Sales Funnel Tracking by Date		
Top Deals Report		

FIG. 22

Contract Tracking Database - Tables		
Tables		Description
Agreement Types		
Companies		
Contracts Listing		
Contract Tracking Database - Agreement Types Table		
Field Name	Data Type	Description
ID	AutoNumber	
Agreement Type	Text	
Description	Memo	
Contract Tracking Database - Companies Table		
Field Name	Data Type	Description
ID	AutoNumber	
Field1	Text	Company names
Contract Tracking Database - Contracts Listing Table		
Field Name	Data Type	Description
ID	AutoNumber	
First Party	Text	
Second Party	Text	
Third Party	Text	
Effective Date	Date/Time	
Termination or Renewal Date	Date/Time	
Termination/Renewal Terms	Memo	
Confidentiality Period?	Text	
Executed Copy on File?	Text	
Location of Original	Text	
Additional Comments	Memo	
Agreement Type	Text	
Executed Contract Image	Hyperlink	Link to scanned image of signed original agreement
Other Document Image	Hyperlink	Link to scanned image of signed original agreement
Transaction Report Image	Hyperlink	Link to scanned image of signed original agreement
Affiliate Involved	Text	
Transaction Type	Text	
Types of IP Involved	Text	
Frequency of Payment	Text	
Payment/Royalty Due Date	Date/Time	
Additional Payment Terms	Text	
Amount Due	Text	
1999 YTD Payments	Currency	
2000 YTD Payments	Currency	
2001 YTD Payments	Currency	
2002 YTD Payments	Currency	
2003 YTD Payments	Currency	
IPType 1	Text	
IPType 2	Text	
IPType 3	Text	
IPType 4	Text	
IPType 5	Text	
Project Name	Text	
Contract Tracking Database - Queries		
Queries		Description

FIG. 23

Company Alpha Order		
Unexecuted Agreements		
<b>Contract Tracking Database - Forms</b>		
<b>Forms</b>		<b>Description</b>
Contracts Listing		
<b>Contract Tracking Database - Reports</b>		
<b>Reports</b>		<b>Description</b>
Unexecuted Agreements		

09750130-061801

FIG. 24

### Innovation Awards Database - Tables

Tables		Description
Awards		
Company Addresses		
ESP Coordinators		
IP Coordinators		

### Innovation Awards Database - Awards Table

Field Name	Data Type	Description
Key #	AutoNumber	Unique Key
Award #	Text	Award ID#
LegalCaseNo	Text	Legal Dept. Case No.
Greeting	Text	Mr., Ms., Dr. etc.
FullName	Text	Recipient's Full Name
CompanyName	Text	Company Name
BusAdr1	Text	Mailstop
BusAdr2	Text	Street Address
City	Text	City
State	Text	State
ZipCode	Text	Zip
Phone#	Text	Business Phone
FAX#	Text	Business FAX
IP ID#	Text	Name of IP Coordinator
SupvGreetings	Text	Mr., Ms., Dr. etc.
SupervisorName	Text	Supervisor's Name
SupvBusAdr1	Text	Supervisor's Mailstop
SupvBusAdr2	Text	Supervisor's Street Address
SupvCity	Text	Supervisor's City
SupvState	Text	Supervisor's State
SupvZipCode	Text	Supervisor's Zip
DHGreeting	Text	Mr., Ms., Dr. etc.
DeptHead	Text	Name of Department Head
DHBusAdr1	Text	Department Head Mailstop
DHBusAdr2	Text	Department Head Street Address
DGCity	Text	Department Head City
DHState	Text	Department Head State
DHZipCode	Text	Department Head Zip
Disclosure Received by Legal	Text	Date Disclosure Received by Legal
Disclosure Received by BIPMAN	Text	Date Disclosure Received by BIPMAN
Letter & Gift Sent to Inventor	Date/Time	Date Letter & Gift Sent to Inventor
Date Application Filed	Date/Time	Date Application Filed
Date BIPMAN Notified of Filing	Date/Time	Date BIPMAN Notified by Legal
Filing Award Request sent to IPC	Date/Time	Date Payment Request Sent to IP Coordinator
Filing Awd Payment Conf Rec'd	Date/Time	Confirmation of Payment to Inventors Rec'd
Filing Award Recognized at Luncheon	Date/Time	Date Award was Recognized at Inn. Awds. Banquet
Date Application Issued	Date/Time	Date Application Issued
US Patent Number	Text	US Patent Number
Date BIPMAN Notified of Filing	Date/Time	Date BIPMAN Notified by Legal
Issuance Award Request sent to IPC	Date/Time	Date Payment Request Sent to IP Coordinator
Iss Awd Payment Conf Rec'd	Date/Time	Confirmation of Payment to Inventors Rec'd
Iss Award Recognized at Luncheon	Date/Time	Date Award was Recognized at Inn. Awds. Banquet
Date 5th Patent Issued	Date/Time	Date Application Issued
US Patent Numbers	Text	US PATENT Numbers for 5 Issued Patents

FIG. 25



Date BIPMAN Notified of Inv Ach Awd	Date/Time	Date BIPMAN Notified by Legal
Inv Ach Award Request sent to IPC	Date/Time	Date Payment Request Sent to IP Coordinator
Inv Ach Awd Payment Conf Rec'd	Date/Time	Confirmation of Payment to Inventors Rec'd
Inv Ach Award Recongnized at Luncheon	Date/Time	Date Award was Recognized at Inn. Awds. Banquet
Date General Award Appl Rec'd	Date/Time	Date Application Filed
General Award Request sent to IPC	Date/Time	Date Payment Request Sent to IP Coordinator
General Awd Payment Conf Rec'd	Date/Time	Confirmation of Payment to Inventors Rec'd
General Award Recognized at Luncheon	Date/Time	Date Award was Recongnized at Inn. Awds. Banquet
Date Article Published	Date/Time	Date Application Filed
Date BIPMAN Notified of Publication	Date/Time	Date BIPMAN Notified by Legal
Rec'd Request for Release Form	Date/Time	Req. for Release Form Rec'd
Publication Award Request sent to IPC	Date/Time	Date Payment Reuquest Sent to IP Coordinator
Confirmation of Payment Red'd	Date/Time	Confirmation of Payment to Inventors Rec'd
Publ Award Recoongized at Luncheon	Date/Time	Date Award was Recongnized at Inn. Awds. Banquet
General Notes	Memo	Comments
Award Type	Text	Type of Award
Gift Received	Text	Gift Sent to Inventor
Disclosure Title	Memo	Title of Patent Disclosure
Application Title	Memo	Title of Patent Application
Patent Title	Memo	Title of Issued Patent
Publication Title	Memo	Title of Published Article
General Award Title	Memo	Reason for General Award
\$ Amount of General Award	Text	\$ Amount of General Award
BellSouth Employee	Text	Still with BellSouth?
Dept Title	Text	Department Head's Title
BSCC ESP Disclosure	Text	Designates if disclosure was rec'd thru BSCC ESP Program
ESP Coordinator	Text	ESP Coordinator's Name

**Innovation Awards Database - Company Addresses Table**

Field Name	Data Type	Description
CompanyName	Text	Company Name
FormalName	Text	Mailstop
BusAdr2	Text	Street Address
City	Text	City
State	Text	State
ZipCode	Text	Zip

**Innovation Awards Database - ESP Coordinators Table**

Field Name	Data Type	Description
ESP Coordinators	Text	
Company	Text	
Market	Text	
Department	Text	
State/Region	Text	
Phone	Text	
Fax	Text	
Street Address 1	Text	
Street Address 2	Text	
City	Text	
State	Text	
ZipCode	Number	
Mail Code	Text	

**FIG. 26**

Innovation Awards Database - IP Coordinators Table		
Field Name	Data Type	Description
IP ID#	Text	IP Coordinator ID#
FullNameIPC	Text	Coordinator's Full Name
Title	Text	Mr., Ms., Dr., etc.
CompanyName	Text	Company Name
BusAdr1	Text	Mailstop
BusAdr2	Text	Street Address
City	Text	City
State	Text	State
ZipCode	Text	Zip
Phone#	Text	Business Phone
FAX#	Text	Business FAX
Innovation Awards Database - Queries		
Queries		Description
Awards Query		
By Date & IPC - Apps Filed		
By Date & IPC - Disclosures Filed		
By Date & IPC - Patents Granted		
By Date & IPC - Apps Filed		
Certificates for Publication Awards		
Certificates for Recipients of Filing Awards		
Certificates for Recipients of Issuance Awards		
Company Order		
DH Mailing Labels - Filing Awards		
DH Mailing Labels - Inv Ach Awards		
DH Mailing Labels - Issuance Awards		
DH Mailing Labels - Publication Awards		
DH of Recipients of Filing Awards		
DH of Recipients of Inventor Ach Awards		
DH of Recipients of Issuance Awards		
DH of Recipients of Publication Awards		
Disclosure Award Letter		
Disclosure Award Letter Query		
Disclosure Gift Check		
General Award		
Inventor Achievement Award		
Inventor Mailing Labels - Filing Awards		
Inventor Mailing Labels - Inv Ach Awards		
Inventor Mailing Labels - Issuance Awards		
Inventor Mailing Labels - Publication Awards		
Issuance Award Winner Check		
Open Filing Awards		
Open General Awards		
Open Inventor Achievement Awards		
Open Issuance Awards		
Open Publications Awards		
Patent Filing Award		
Patent Issuance Award		
Progress Report		
Publications Award		
Recipients of Filing Awards		

FIG. 27

Recipients of Inventor Achievement Awards		
Recipients of Issuance Awards		
Recipients of Publication		
<b>Innovation Awards Database - Forms</b>		
<b>Forms</b>		<b>Description</b>
Awards		
Company Addresses		
ESP Coordinators		
IP Coordinators		
<b>Innovation Awards Database - Reports</b>		
<b>Forms</b>		<b>Description</b>
Awards		
By Date and IPC - Apps Filed		
By Date and IPC - Disclosures Filed		
By Date and IPC - Patents Granted		
Copy of Recipients of Issuance Awards - Report for Award Mfg		
DH of Recipients of Filing Awards		
DH of Recipients of Inventor Ach Awards		
DH of Recipients of Issuance Awards		
DH of Recipients of Publications Awards		
Disclosure Award letter		
General Award Form		
Inventor Achievement Award Form - 10 issued		
Inventor Achievement Award Form - 5 issued		
Open Filing Awards		
Open General Awards		
Open Inventor Achievement Awards		
Open Issuance Awards		
Open Publication Awards		
Patent Filing Award Form		
Patent Issuance Award Form		
Progress Report		
Publications Award Form		
Recipients of Filing Awards - Sort by Award #		
Recipients of Filing Awards - Sort by Inventor Name		
Recipients of Inventor Achievement Awards - Sort by Award #		
Recipients of Issuance Awards - Sort by Award #		
Recipients of Issuance Awards - Sort by Inventor Name		
Recipients of Publication Awards - Sort by Award #		
Recipients of Publication Awards - Sort by Inventor Name		
Verification Table		

FIG. 28

09750130 061801

BellSouth-Intellectual Property Marketing Database			
Status of Opportunity:	L2 - Awaiting Execution Pre-Transaction		Opportunity No. 1
Date Status Changed To:	L1	L2 12/9/98	L3 L4 L5
Product/Project Name:	TechNet	Deal Size:	C = LARGE
Product Group:	Network	Deal Priority:	A = LOW
Product Type:	Software	Top Deals Rept?	<input type="checkbox"/>
Type of IP Involved:	Proprietary Information	Est. \$\$\$ Range:	
Patent Status:	Filed	Deal \$\$\$ Value:	
BellSouth Entity:	BellSouth Telecommunications, Inc.	BIPMARK Lead:	CB
Sub-entity Name :	Network	BIPMARK Support 1:	
BellSouth Contacts:	Bill Smith	BIPMARK Support 2:	
		BIPMARK Support 3:	
Marketing Participant:	Andersen Consulting (to BT, SBC)	Participant Type:	Remarketing
Address:		Participant Contacts:	
City, State, Zip			
Estimated Availability Date:	1/ 1/99		
Description of Opp. :			
Status of Deal:			
Background of Deal:			
IT Platform:			
Financial Analysis:			
Competitive Analysis:			
Comments for Top Deals Report:			
Next Scheduled Follow-Up Date:	1/15/99		
Follow-Up Actions to be Taken:	Check on status of investigation		

FIG. 29

09750130-01501

<u>Patent</u>	<u>Status</u>
1	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10	10
11	11
12	12
13	13
14	14
15	15
16	16
17	17
18	18
19	19
20	20
21	21
22	22
23	23
24	24
25	25
26	26
27	27
28	28
29	29
30	30
31	31
32	32
33	33
34	34
35	35
36	36
37	37
38	38
39	39
40	40
41	41
42	42
43	43
44	44
45	45
46	46
47	47
48	48
49	49
50	50
51	51
52	52
53	53
54	54
55	55
56	56
57	57
58	58
59	59
60	60
61	61
62	62
63	63
64	64
65	65
66	66
67	67
68	68
69	69
70	70
71	71
72	72
73	73
74	74
75	75
76	76
77	77
78	78
79	79
80	80
81	81
82	82
83	83
84	84
85	85
86	86
87	87
88	88
89	89
90	90
91	91
92	92
93	93
94	94
95	95
96	96
97	97
98	98
99	99
100	100

**Company Name**

**Lead**      **Support**

Est. Value

**Deal Size**

**Priority**

Reason/Comments

[L0=Potential Opportunity] [L1=Initial Research in Progress] [L2=Awaiting Exec. Pre-Transaction Report] [L3=Negotiations in Progress] [L4=Awaiting Exec. Agrmt/Transaction Report] [L5=Contract Completed/Closed]  
 Tuesday, December 14, 1999

**FIG. 30**

**PRIVATE/PROPRIETARY**  
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**PRIVATE/PROPRIETARY**

708100-02F05260

*BellSouth Intellectual Property Marketing Corporation  
Level 1 (Initial Research in Progress) WIP Report*

*Date Generated: Tuesday, December 14, 1999*

<u>Product/Project Name</u>	<u>Subsidiary Name</u>	<u>Opp #</u>	<u>Patent Status</u>	<u>Company Name</u>	<u>Lead</u>	<u>Support</u>	<u>Est. Value</u>	<u>Deal Size</u>	<u>Priority</u>	<u>Date Chgd</u> <u>to LI</u>
-----------------------------	------------------------	--------------	----------------------	---------------------	-------------	----------------	-------------------	------------------	-----------------	----------------------------------

09-07-08

FIG. 32



FOBT 30" DET 05260

## *Unexecuted Agreements*

<i>Agreement Type</i>	<i>First Party</i>	<i>Second Party</i>
-----------------------	--------------------	---------------------

09750130-061801

Award # D99-192		Type Disclosure Award		Legal Case # D99192		Key # 868	
<b>Inventor Information</b>							
Title Mr.		Name		Phone No.			
BellSouth Co.				FAX No.			
Suite				Still BellSouth employee?			
Address				IP Coordinator ID#			
City		State		Zip			
<b>Inventor's Supervisor</b>				<b>Inventor's Department Head</b>			
Title		Name		Title		Name	
Suite				Suite			
Address				Address			
City		State		City		State	
		Zip				Zip	
<b>Disclosure Award</b>				<b>Filing Award</b>			
Title Sales Information Storage/Tracking/Notification				Title			
11/11/99 Disclosure Received by Legal				Date Application Filed			
11/11/99 Disclosure Received by BIPMAN				Date BIPMAN Notified of Filing			
11/16/99 Letter and Gift Sent to Inventor				Filing Award Request Sent to IPC			
Gift Sent Wooden Pen				Filing Award Payment Conf. Rec'd			
BSCC-ESP Program: No Coord Name				Filing Award Recognized at Banquet			
<b>Issuance Award</b>				<b>Publication Award</b>			
US Patent Number				Title/Public Name			
Title				Date Article Published			
Date Patent Issued				Date BIPMAN Notified of Publication			
Date BIPMAN Notified of Issuance				Rec'd Request for Release Form			
Issuance Award Request Sent to IPC				Publication Award Request Sent to IPC			
Issuance Award Payment Conf. Rec'd				Confirmation of Payment Rec'd			
Iss. Award Recognized at Banquet				Publ. Award Recognized at Banquet			
<b>Inventor Achievement Award</b>				<b>General Award</b>			
Patent Nos.				Title			
Date Last Patent Issued				Amount of General Award			
Date BIPMAN Notified of Inv. Ach. Award				Date General Award Appl. Rec'd			
Inv. Ach. Award Request Sent to IPC				General Award Request Sent to IPC			
Inv. Ach. Award Payment Conf. Rec'd				General Award Payment Conf. Rec'd			
Inv. Ach. Award Recognized at Banquet				Gen. Award Recognized at Banquet			
General Notes							

FIG. 34

09750130-061801

Microsoft Access

File Edit View Insert Format Records Tools Window Help

Company Addresses

Company Name	BelSouth Entertainment
Formal Name	BelSouth Entertainment, Inc.
Street Address	1100 Abernathy Road
City	Atlanta
State	GA
Zip Code	30328

Records: 1 of 1

Award: Del

Company Name

FIG. 35

09750130-061801












ESP COORDINATORS		  	
ESP COORDINATOR	JANE DOE		
COMPANY	A - ALL		
MARKET	ALL STATES		
STATE / REGION	ALL STATES / REGS		
PHONE	(404) 555-1212		
FAX	(404) 555-1313		
STREET ADDRESS 1	100 PEACHTREE STREET		
STREET ADDRESS 2	SUITE 4005		
CITY	ATLANTA		
STATE	GA		
ZIP	30309		
MAIL CODE	MC01		
RECORD	  	1	     of 54

FIG. 36

09750130-061801

Microsoft Access

File Edit View Insert Format Records Tools Window Help

IP Coordinators

IP ID#			
Full Name	Amy Sherwood	Title	Ms.
Company Name	SBS - BolSouth Business Systems, Inc.		
Mailstop	7E01		
Street Address	1155 Peachtree Street, N.E.		
City	Atlanta		
State	GA	Zip Code	30309
Phone#	(404) 249-2738	FAX#	(404) 249-2866

Records: 1 of 1

Awards: Del

IP Coordinator

FIG. 37

## Innovation Award Request Patent Filing Award

Date of Request <i>December 8, 1999</i>	BellSouth File No. <i>98059</i>	Innovation Award No. <i>A99-075</i>
Date Application Filed:  Title of Application:		
<p><i>Please arrange payment of a Specific Innovation Award for filing of a patent application for the inventor listed below. Innovation Awards should be grossed up for federal and state taxes. Due to the significance of this contribution to BellSouth, the award should be presented in an appropriate ceremony in the presence of the inventor's peers and/or higher management.</i></p> <p style="text-align: center;"><i>Award Amount:</i></p> <p style="text-align: center;"><i>Approved By: <u>  X  </u> IP Legal</i>  <span style="margin-left: 150px;"><i>BellSouth IP Management Corp.</i></span></p>		
Inventor Name  _____	Inventor Signature  _____	
Supervisor Name  _____	Supervisor Signature  _____	
IP Coordinator Name  _____	IP Coordinator Signature  _____	
<p><b><i>Certification of payment and this signed request form must be returned to:</i></b></p> <p style="text-align: center;"> <b><i>Julia Spires, Intellectual Property Administrator</i></b>  <b><i>1155 Peachtree Street, NE - Suite 500 - Atlanta, GA 30309</i></b>  <b><i>(404) 249-2961</i></b> </p>		

### PRIVATE/PROPRIETARY/LOCK

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**MEMORANDUM**

**To:** John E. Lewis  
**From:** Marcus Delgado  
**Date:** December 8, 1999  
**RE:** Notification of Patent Application Filing for  
Title:  
BellSouth No.:  
Filing Date:

---

The above-referenced patent application was filed in the U.S. Patent and Trademark Office ("PTO") on the filing date shown above. We expect the official filing receipt, including the assigned serial number for this application, within the next several weeks.

We will keep you advised of further progress as the application proceeds through the PTO.

cc: Donna Post

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*Patents Granted 9/1/99 Through 11/30/99*

<u>Award</u>	<u>Legal No.</u>	<u>Inventor Name</u>	<u>Company Name</u>	<u>Patent Title</u>	<u>US Patent No.</u>	<u>Date Issued</u>
A99-067	98013	JoAnn Blount (retired)	BSCC - BellSouth Cellular Corp.	Method and System for Automatically Connecting Telephone Calls to Multiple Devices Having Different Directory Numbers (as amended)	5,963,864	10/ 5/99

FIG. 40



## Intellectual Property Management Database System

## Marketing Table

Field Name		Data Type	Description		Relates (KEY)				Location of Data	Editable	Security	Comments
Project Number		Number	Unique number to keep track of each project		PK			System generated	Non-Editable			
Project Name		Character	Name of the project					Free Form Entry	Editable			
Status of Project		Character	Status of the project					Lookup Table	Editable			
											A version can update when changing status levels.	
Status Date		Date	Anticipated dates for different status levels					Can be system generated and/or free form.	Editable			
Customer			Pulls additional information into database, Name, Contact, Phone - from People/Address table					Lookup Table	Editable			
			Customer Name									
			Contact									
			Phone									
			Party to final contract?									
			Pulls additional information into database, Name, Contact, Phone, party to final contract - from People/Address table									
Remarketing Partner			Company Name					Lookup Table	Editable			
			Contact									
			Phone									
			Party to final contract?									
			Pulls additional information into database, Name, Role, party to final contract - from People/Address table									
IP Group Personnel			Name					Lookup Table	Editable			
			Role									
Products		Character	Pointer back to product table					Lookup Table	Editable			
			Product Name									
Deal Size		Character	Drop Down Estimate, small, medium and large					Lookup Table	Editable			
Deal Value		Number	Actual deal value entered after the deal is closed					Free Form	Editable			
Deal Priority		Character	low, medium, high					Lookup Table	Editable			
Include in Top Deals Report		Y/N (or CHAR)	Check box designating as important deal					Free Form	Editable			
Description of Project		Character	Next Scheduled Followup Date					Freeform	Editable			
Followup Date		DATE	Follow-up Actions to be Taken					Freeform	Editable			
Followup Actions		Character	Responsible Party for Follow-up - Looks at People/Address Table - Potentially allow multiple values					Freeform	Editable			
Responsible Party		Character						Lookup Table	Editable			

FIG. 41

Files	Character	pointer back to files and file comments	Freeform	Editable		
		File				
		Comments				
Associated Contract		Pointer that pulls information from contract table - including name	Lookup Table	Editable		
		Name				
		Agreement Type				

Contract Tracking Table

Relates

Field Name	Data Type	Description	(KEY)	Location Data	Editable	Security	Comments
Agreement Number	Number		KEY	System Generated	Non-Editable		
Agreement Name	Character			Freeform	Editable		
Agreement Type	Character			Lookup Table	Editable		
Project Number	Number	Key field for linking to marketing opportunities	Potentially a Foreign Key	Potentially a Foreign Key	Non-Editable		
Parties	Character	Lookup to People/Address table		Lookup Table	Editable		Should be able to add to the list
		Company Name					
		Type					
		Contact					
Effective Date	DATE			Freeform	Editable		
Termination/Renewal Date	DATE			Freeform	Editable		
Termination/Renewal Terms	Character			Freeform	Editable		
List IP	Character	List of IP Involved: pop-up box to add IP pointers, IP Type, Name, Ref #	Potentially a Foreign Key	Potentially a Foreign Key	Non-Editable		User can modify which IP is licensed
		IP Type					
		Name					
		Ref. #					
Exclusivity	Character	values: exclusive, non-exclusive		Lookup Table	Editable		
Form of Agreement	Character	values: Distribution License, Straight Use License, Strategic Agreement		Lookup Table	Editable		
Description	Character			Freeform	Editable		
Type of Revenue	Character	values: cash, savings, cash & savings		Lookup Table	Editable		
Unique T&C	Character			Freeform	Editable		
Frequency of Payment	Character			Lookup Table	Editable		
Reason for Termination	Character			Freeform	Editable		
Type of License	Character	Do we still want this? ...not on screen shots		Lookup Table	Editable		
Confidentiality Period	DATE			Freeform	Editable		This can be a range or a final date.

FIG. 42

File	Character	Pointer to attached files and comments	Freeform	Editable
		File Name		
		Comments		
Product	Character			
BellSouth Business Unit	Character	Pointer to BellSouth Business Unit and Royalty Percentage	Lookup Table	Editable
		BellSouth Business Unit		
		Royalty Percentage		
Notice Date	Date			
Customers Party to Contract	Character			
Parties to Contract	Character			
Underlying Ip of Product	Character			
Action	Character	Button (field) that points to information in the action table	Lookup Table	
		Expected Due Date		
		Actual Date		
		Action Type (Lookup)		
		Expected Amount		
		Actual Amount		
		Expected Action		
		Actual Action		
		Internal Contact		
		External Contact		
		Comments		
Comments	Character		Freeform	

IP TABLE (Trade Secrets or Copyrights)

Field Name		Data Type		Description		Relates (KEY)		Location Data		Editable		Security		Comments	
IP #		Number		System Generated		Primary Key		Primary Key		Non-Editable					
IP Type		Character		TS or Copyright or Both				Lookup Table		Editable					
IP Name		Character						Freeform		Editable					
BellSouth Sub-entity		Character						Freeform		Editable					
BellSouth Business Unit		Character						Lookup Table		Editable				Could also be freeform	
IP Description		Character		Freeform comments				Freeform		Editable					
Associated Files Attached		Character		Pointer to electronic file and comments				Freeform		Editable					
				File Name											
				Comments											
Copyright Filed?		Character		Build Lookup N/A, Yes or No.				Lookup Table		Editable					

Product Table										
Field Name		Data Type	Description		Relates (KEY)		Location Data	Editable	Security	Comments
Product Description		Character	Product Description			Primary Key	Freeform	Editable		
Product Number		Number	System Generated				Primary Key	Non-editable		System Generated
BellSouth Sub-entity		Character					Freeform	Lookup Table		
BellSouth Business Unit		Character	Allow multiple values				Lookup Table	Editable		Could also be freeform
BellSouth Contacts		Character	Pointer to People/Address Table, Name, Phone and Position (e.g., role)				Freeform	Editable		
			Name							
			Phone #							
			Position							
List of Patents		Character	Pointer to CPI Patent Database Records				CPI System	Editable		
			Status							
			Docket #							
			Country							
			App. #							
			Filing Date							
			Patent #							
			Issue Date							
			Inventor							
			Title							
			Comments - Not sure if in CPI							
List of TM		Character	Pointer to CPI TM Database Records				CPI System	Editable		
			Status							
			Mark							
			Country							
			App. #							
			Docket #							
			Filing Date							
			Reg. #							
			Reg. Date							
			Renewal Date							
			Comments - Not sure if in CPI							
List of Trade Secrets & Copyrights		Character	Pointer to IP Table				Lookup Table	Editable		
			Name							
			Description							
			BellSouth Sub-entity							
			BellSouth Business Unit							
			IP #							

FIG. 44

Date Available for Sale	DATE							
Technical Requirements	Character			Freeform	Editable			
Product Name	Character	allow multiple values		Freeform	Editable			
Files	Character	pointer to files and comments		Lookup Table	Editable			
		File Name						
		Comments						
Patents Table (CPI)-Used in IP Table								
Field Name	Data Type	Description	Relates (KEY)	Location Data	Editable	Security	Comments	
Patent #								
Issue Date								
Inventor								
Status								
Docket #								
Title								
Country								
App #								
Filing Date								
Comments		This may not be in CPI						
Trademark Table (CPI) Used in IP Table								
Field Name	Data Type	Description	Relates (KEY)	Location Data	Editable	Security	Comments	
Mark								
Reg. #								
Registration Date								
Status								
App #								
Docket #								
Country								
Filing Date								
Renewal Date								
Comments		This may not be in CPI						
Corp/Org. Table								
Field Name	Data Type	Description	Relates (KEY)	Location Data	Editable	Security	Comments	
Name								
Type		IP Group, Remarketing, Customer, Alliance						

FIG. 45

People/Address Table						
Field Name	Data Type	Description	Relates (KEY)	Location Data	Editable	Security
Org						
Name						
Phone						
Address						
Comments						
Position						
Roles Lookup Values						
Contact						
Research						
Other						
Contact Lookup Values						
IP Group Personnel						
End Users/Customers						
BellSouth Business Unit						
Status Lookup Values						
Conduct Initial Research		Used in Marketing Module				
Conduct Market Research and Analysis						
Develop marketing plan & package						
Sell product						
Negotiate contract						
Complete & approve transaction report						
Execute contract						
Set up maintenance plan						
Close out project						
BellSouth Business Units Lookup Values						
BASC (Affiliate Service Corp.)		Used in IP Inventory Module, Product Inventory Module				
BBI (Billing Inc.)						
BBB (Business Systems)						
BPC (Public Communications)						
BSC (Corporate)						
BSCC (Cellular)						
BSE (Entertainment)						
BSI (International)						
BSNET (.Net)						
BST (Telecommunications)						

FIG. 46



ACTION TABLE						
Field Name	Data Type	Description	Relates (KEY)	Location Data	Editable	Security
Action Due Date	Date			Freeform		
Action Type	Character			Freeform		
Expected Amount	Number			Freeform		
Expected Action	Character			Freeform		
BellSouth Sub-entity	Character			Freeform		This can be business unit.
Royalty Expected Due Date	Date			Freeform		
Royalty Actual Date	Date			Freeform		
Royalty Action Type	Character			Lookup Table		
Royalty Expected Amount	Number			Freeform		
Royalty Actual Amount	Number			Freeform		
Royalty Expected Action	Character			Freeform		
Royalty Actual Action	Character			Freeform		
Royalty Internal Contact	Character			Lookup Table		
Royalty External Contact	Character			Lookup Table		
Royalty Comments	Character			Freeform		
Start Date	Date			Freeform		
End Date	Date			Freeform		
Period	Character			Lookup		



Contacts TABLE						
Field Name	Data Type	Description	Relates (KEY)	Location Data	Editable	Security
Company Name				Freeform		
BellSouth Sub-entity				Freeform		
Type		IP Group, Remarketing, Customer, Alliance, Bellsouth				
Events		Internal				
		Pointer to Events table		Freeform		
		Date				
		Comments				
		Attached Files				
Contacts						
		Name				
		Title				
		Country				
		Address1				
		Address2				
		City				
		State				
		Zip				
		Phone				
Individual Contact Events		Pointer to Individual Contact Events Table				
		Date				
		Comments				
		Attached Files				

TOBT90-DETD5260

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM



IP Inventory Module

Product Inventory Module

Marketing Module

Contracts Module

Searching/Reporting Module

Contacts Module

FIG. 50

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM			
<u>IP Inventory</u>	<u>Product Inventory</u>	<u>Marketing</u>	<u>Contracts/Agreements</u> <u>Searching/Reporting</u> <u>Contacts</u>
<u>IP Inventory Module</u>	<u>IP Inventory</u>		
Create New Trade Secret or Copyright Record <u>View Inventory</u> <u>Search Inventory</u>	Please choose an option from the menu bar on the left.		

FIG. 51

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP Inventory](#)
[Product Inventory](#)
[Marketing](#)
[Contracts/Agreements](#)
[Searching/Reporting](#)
[Contacts](#)

## Create/Edit Trade Secret/Copyright

IP #  Copyright Filed ☐

IP Name

IP Type

BellSouth Business Unit

BellSouth Sub-entity

IP Description

Associated Files Attached

Remove File

Browse

File to Attach

File Name	Comments
<input type="text"/>	<input type="text"/>

Submit

Cancel

[IP Inventory](#)  
[Module](#)  
[Create New Trade Secret or Copyright Record](#)  
[View Inventory](#)  
[Search Inventory](#)

FIG. 52

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory   Product Inventory   Marketing   Contracts/Agreements   Searching/Reporting   Contacts

<i>IP Inventory Module</i>	<u><b>View Inventory</b></u>
<u>Create New Trade Secret or Copyright Record</u>	
<u>View Inventory</u>	
<u>Search Inventory</u>	
	<u><b>Patents</b></u>
	Sort By <input type="text" value="N/A"/>
	<u><b>Trademarks</b></u>
	Sort By <input type="text" value="N/A"/>
	<u><b>Trade Secret &amp; Copyrights</b></u>
	Sort By <input type="text" value="N/A"/>
	<input type="button" value="Submit"/> <input type="button" value="Cancel"/>

FIG. 53

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP Inventory](#)
[Product Inventory](#)
[Marketing](#)
[Contracts/Agreements](#)
[Searching/Reporting](#)
[Contacts](#)

## IP Inventory Module

[Create New Trade Secret or Copyright Record](#)

[View Inventory](#)

[Search Inventory](#)

## View Inventory

### Patents

Sort By

### Trademarks

Patent #  
Issue Date

Status  
Default

Sort By

### Trade Secrets

Docket #  
Country

App #

Filing Date

Name

Sort By

Submit

Cancel

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP Inventory](#)
[Product Inventory](#)
[Marketing](#)
[Contracts/Agreements](#)
[Searching/Reporting](#)
[Contacts](#)

*IP Inventory Module*

[Create New Trade Secret or Copyright Record](#)  
[View Inventory](#)  
[Search Inventory](#)

## View Inventory

Patents

Sort By

Trademarks

Sort By

Trade

hts

Trademark Name  
 TM #  
 Registration Date  
 Status  
 Default

Submit Cancel

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP Inventory](#) [Product Inventory](#) [Marketing](#) [Contracts/Agreements](#) [Searching/Reporting](#) [Contacts](#)

## IP Inventory Module

[Create New Trade Secret or Copyright Record](#)

[View Inventory](#)

[Search Inventory](#)

## View Inventory

### Patents

Sort By

### Trademarks

Sort By

### Trade Secret & Copyrights

Sort By

Submit	Name
	BellSouth Entity
	Business Unit
	IP #
	Description
	Default

FIG. 56



## INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory Product Inventory Marketing Contracts/Agreements Searching/Reporting Contacts

IP Inventory Module

Create New Trade Secret or  
Copyright Record

View Inventory

Search Inventory

View InventoryPatents

<u>Status</u>	<u>Docet #</u>	<u>Country</u>	<u>App #</u>	<u>Filing Date</u>	<u>Patent #</u>	<u>Issue Date</u>	<u>Inventor</u>	<u>Title</u>	<u>Comments</u>
Data	Data	Data	Data	Data	Data	Data	Data	Data	Data

Trademarks

<u>Status</u>	<u>Mark</u>	<u>Country</u>	<u>Docet #</u>	<u>App #</u>	<u>Filing Date</u>	<u>Reg. #</u>	<u>Reg. Date</u>	<u>Renewal Date</u>	<u>Comments</u>
Data	Data	Data	Data	Data	Data	Data	Data	Data	Data

Trade Secrets & Copyrights

<u>Name</u>	<u>Description</u>	<u>BellSouth Entity</u>	<u>Business Unit</u>	<u>IP#</u>
Data	Data	Data	Data	Data

INTELLECTUAL PROPERTY MANAGEMENT SYSTEM	
<a href="#">IP Inventory</a>	<a href="#">Product Inventory</a>
<a href="#">Marketing</a>	<a href="#">Contracts/Agreements</a>
<a href="#">Searching/Reporting</a>	<a href="#">Contacts</a>
<a href="#">IP Inventory Module</a>	<a href="#">Search Inventory</a>
<a href="#">Create New Trade Secret or Copyright Record</a>	<a href="#">Patents - CPI System</a>
<a href="#">View Inventory</a>	<a href="#">Trademarks - CPI System</a>
<a href="#">Search Inventory</a>	<a href="#">Trade Secrets &amp; Copyrights</a>

FIG. 58

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP Inventory](#) [Product Inventory](#) [Marketing](#) [Contracts/Agreements](#) [Searching/Reporting](#) [Contacts](#)

## IP Inventory Module

[Create New Trade Secret or Copyright Record](#)

[View Inventory](#)

[Search Inventory](#)

## Search Patents

Status		Filing Date	
Docket #		Patent #	
Country		Issue Date	
App. #		Title	
Inventor		Comments	

Search All Fields

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP Inventory](#) [Product Inventory](#) [Marketing](#) [Contracts/Agreements](#) [Searching/Reporting](#) [Contacts](#)

<i>IP Inventory Module</i>	<u>Search Patents Results</u>									
<a href="#">Create New Trade Secret or Copyright Record</a> <a href="#">View Inventory</a> <a href="#">Search Inventory</a>	Status	Docket #	Country	App. #	Filing Date	Patent #	Issue Date	Inventor	Title	Comments
	Data	Data	Data	Data	Data	Data	Data	Data	Data	Data

FIG. 60

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP Inventory](#) [Product Inventory](#) [Marketing](#) [Contracts/Agreements](#) [Searching/Reporting](#) [Contacts](#)

*IP Inventory Module*

[Create New Trade Secret or](#)

[Copyright Record](#)

[View Inventory](#)

[Search Inventory](#)

## Search Trademarks

Status		Filing Date	
Mark		Reg. #	
Country		Reg. Date	
Docket #		Renewal Date	
App. #		Comments	

Search All Fields

Search

Cancel

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory   Product Inventory   Marketing   Contracts/Agreements   Searching/Reporting   Contacts

<i>IP Inventory Module</i>	Search Trademark Results								
<a href="#">Create New Trade Secret or Copyright Record</a> <a href="#">View Inventory</a> <a href="#">Search Inventory</a>	<u>Status</u>	<u>Mark</u>	<u>Country</u>	<u>Docket #</u>	<u>App #</u>	<u>Filing Date</u>	<u>Reg. #</u>	<u>Renewal Date</u>	<u>Comments</u>
	Data	Data	Data	Data	Data	Data	Data	Data	Data

FIG. 62

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory   Product Inventory   Marketing   Contracts/Agreements   Searching/Reporting   Contacts

## IP Inventory Module

[Create New Trade Secret or Copyright Record](#)

[View Inventory](#)

[Search Inventory](#)

## Search Trade Secret/Copyright Issue

IP#  Copyright Filed ☐ N/A ☒

IP Name

IP Type  N/A ☒

BellSouth Business Unit

BellSouth Sub-entity

IP Description

Full Text File Search

Search

Cancel

FIG. 63

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory   Product Inventory   Marketing   Contracts/Agreements   Searching/Reporting   Contacts

<i>IP Inventory Module</i>	<u>Search Results</u>
<u>Create New Trade Secret or Copyright Record</u> <u>View Inventory</u> <u>Search Inventory</u>	<b>Trade Secrets &amp; Copyrights</b>  <div> <u>Name</u>  <u>Data</u> </div> <div> <u>Type</u>  <u>Data</u> </div> <div> <u>IP #</u>  <u>Data</u> </div> <div> <u>BellSouth Business Unit</u>  <u>Data</u> </div> <div> <u>BellSouth Sub-entity</u>  <u>Data</u> </div>

FIG. 64



# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP](#)    [Product](#)    [Marketing Contracts/Agreements](#)    [Searching/Reporting](#)    [Contacts](#)  
[Inventory](#)    [Inventory](#)

## Product Inventory

Please choose an option from the menu bar on the left.

[Create New](#)  
[Product](#)

[View Products](#)

[Search For](#)  
[Product](#)

[View/Edit](#)  
[Contacts](#)

FIG. 65

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory Inventory

Product  
Inventory  
Module

Create/Edit Product

Create New  
Product

View Products

Search For  
Product

View/Edit  
Contacts

Product Name

Product Number 1234343

BellSouth Business Unit

BellSouth Sub-entity

Product Description

Date Available for Sale

Technical Requirements

BellSouth Contacts

FIG. 66

## BellSouth Contacts

<u>Name</u>	<u>Phone #</u>	<u>Position</u>
Add Contact		Remove Contact

## List of IP

### Patents

<u>Status</u>	<u>Docket #</u>	<u>Country</u>	<u>App. #</u>	<u>Filing Date</u>	<u>Patent #</u>	<u>Issue Date</u>	<u>Inventor</u>	<u>Title</u>	<u>Comments</u>
Add Patents					Remove Patents				

### Trademarks

<u>Status</u>	<u>Mark</u>	<u>Country</u>	<u>Docket#</u>	<u>App#</u>	<u>Filing Date</u>	<u>Reg. #</u>	<u>Reg. Date</u>	<u>Renewal Date</u>	<u>Comments</u>
Add Trademarks					Remove Trademarks				

### Trade Secrets & Copyrights

Trade Secrets & Copyrights

<u>Name</u>	<u>Description</u>	<u>BellSouth Sub-Entity</u>	<u>Business Unit</u>	<u>IP#</u>

Create TS/Copyright

Remove TS or Copyright

Add TS or Copyright

Associated Files Attached

File to Attach

Remove File

Browse...

File Name

Comments

Submit

Cancel

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP      Product      Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory      Inventory

Product  
Inventory  
Module

View Products

Create New  
Product

View Products

Search For  
Product

View/Edit  
Contacts

View All Products

View All Products Sorted By BellSouth Business  
Unit

View All Products for Specific BellSouth Business  
Unit

Advanced View

FIG. 69

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP   Product   Marketing Contracts/Agreements   Searching/Reporting   Contacts  
Inventory   Inventory

## View All Products

*Product  
Inventory  
Module*

Create New  
Product

View Products

Search For  
Product

View/Edit  
Contacts

Name

Data

BellSouth Business Unit

Data

Description

Data

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP Inventory](#)
[Product Inventory](#)
[Marketing Contracts/Agreements](#)
[Searching/Reporting](#)
[Contacts](#)

## View All Products by BellSouth Business Unit

[Product Inventory Module](#)

[Create New Product](#)

[View Products](#)

[Search For Product](#)

[View/Edit Contacts](#)

BellSouth Business Unit

Data

Name

Data

Description

Data

FIG. 71

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP Inventory](#)
[Product Inventory](#)
[Marketing Contracts/Agreements](#)
[Searching/Reporting](#)
[Contacts](#)

[Product Inventory Module](#)

## View All Products By Specific BellSouth Business Unit

[Create New Product](#)

[View Products](#)

[Search For Product](#)

[View/Edit Contacts](#)

BellSouth Business Unit:

Submit

BASC  
 BBI  
 BBS  
 BPC  
 BSC  
 BSCC  
 BSE  
 BSI  
 BSNET  
 BST



# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP      Product      Marketing Contracts/Agreements      Searching/Reporting      Contacts  
Inventory      Inventory

## View All Products By Specific BellSouth Entity

Product  
Inventory  
Module

Create New  
Product

View Products

Search For  
Product

View/Edit  
Contacts

BellSouth Entity

Data

Name

Data

Description

Data

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP](#)   [Product](#)   [Marketing Contracts/Agreements](#)   [Searching/Reporting](#)   [Contacts](#)  
[Inventory](#)   [Inventory](#)

## View Products Advanced View

*Product  
Inventory  
Module*

[Create New  
Product](#)

[View Products](#)

[Search For  
Product](#)

[View/Edit  
Contacts](#)

1.) Sort By:

N/A

2.) Sort By:

N/A

3.) Sort By:

N/A

Submit

Cancel

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP](#)    [Product](#)    [Marketing Contracts/Agreements](#)    [Searching/Reporting](#)    [Contacts](#)  
[Inventory](#)    [Inventory](#)

## View Products Advanced View

[Product](#)  
[Inventory](#)  
[Module](#)

[Create New](#)  
[Product](#)

[View Products](#)

[Search For](#)  
[Product](#)

[View/Edit](#)  
[Contacts](#)

1.) Sort By:

N/A

2.) Sort By:

N/A

3.) Sort By:

N/A

N/A

Submit

BellSouth Entity

Name

Description

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory Inventory

## View Products Advanced View

Product  
Inventory  
Module

Create New  
Product

View Products

Search For  
Product

View/Edit  
Contacts

1.) Sort By:

2.) Sort By:

3.) Sort By:

FIG. 76

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP Inventory](#)
[Product Inventory](#)
[Marketing Contracts/Agreements](#)
[Searching/Reporting](#)
[Contacts](#)

## View Products Advanced View

<u>Name</u>	<u>BellSouth Entity</u>	<u>Description</u>
Data	Data	Data

[Product Inventory Module](#)

[Create New Product](#)

[View Products](#)

[Search For Product](#)

[View/Edit Contacts](#)

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP      Product      Marketing Contracts/Agreements      Searching/Reporting      Contacts  
Inventory      Inventory

Product  
Inventory  
Module

## Search Products

Create New  
Product

View  
Products

Search For  
Product

View/Edit  
Contacts

Product Number

Product Name

BellSouth Business Unit

BellSouth Sub-entity

Product Description

Date Available for Sale

Technical Requirements

BellSouth Contacts

FIG. 78

## BellSouth Contacts

<u>Name</u>	<u>Phone #</u>	<u>Position</u>

Add Contact

Remove Contact

## List of IP

### Patents

<u>Status</u>	<u>Docket#</u>	<u>Country</u>	<u>App #</u>	<u>Filing Date</u>	<u>Patent #</u>	<u>Issue Date</u>	<u>Inventor</u>	<u>Title</u>	<u>Comments</u>

Add Patents

Remove Patents

### Trademarks

<u>Status</u>	<u>Mark</u>	<u>Country</u>	<u>Docket#</u>	<u>App#</u>	<u>Filing Date</u>	<u>Reg. #</u>	<u>Reg. Date</u>	<u>Renewal Date</u>	<u>Comments</u>

Add Trademarks

Remove Trademarks

### Trade Secrets & Copyrights

Trade Secrets & Copyrights

Name	Description	BellSouth Sub-entity	Business Unit	IP#

Add Trade Secrets or Copyrights

Remove Trade Secrets or Copyrights

Associated Files Attached

File Name	Comments

Full Text File Search

Search

Cancel

FIG. 80



# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP      Product  
Inventory   Inventory   Marketing Contracts/Agreements Searching/Reporting Contacts

<u>Product Inventory Module</u>	<u>Product Search Results</u>
<u>Create New Product</u> <u>View Products</u> <u>Search For Product</u> <u>View/Edit Contacts</u>	<u>Product Name</u> <u>Data1</u>  <u>Any Criteria Used in Search</u> <u>Data2</u>

FIG. 81

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory Inventory

Product  
Inventory  
Module

View Product

Create New  
Product

View Products

Search For  
Product

View/Edit  
Contacts

Product Number 12323

BellSouth Sub-entity Entity

Product Description

Date Available for Sale 2/14/2000

Technical Requirements

Product Name Product

BellSouth Business Unit Main Unit

BellSouth Contacts

Name

Phone #

Position

Howard Johnson

1-800-555-1212

Director

List of IP

## List of IP

### Patents

<u>Status</u>	<u>Docket#</u>	<u>Country</u>	<u>App. #</u>	<u>Filing Date</u>	<u>Patent #</u>	<u>Issue Date</u>	<u>Inventor</u>	<u>Title</u>	<u>Comments</u>

### Trademarks

<u>Status</u>	<u>Mark</u>	<u>Country</u>	<u>Docket#</u>	<u>App#</u>	<u>Filing Date</u>	<u>Reg. #</u>	<u>Reg. Date</u>	<u>Renewal Date</u>	<u>Comments</u>

### Trade Secrets & Copyrights

<u>Name</u>	<u>Description</u>	<u>BellSouth Sub-entity</u>	<u>Business Unit</u>	<u>IP#</u>

### Associated Files Attached

<u>File Name</u>	<u>Comments</u>

Edit

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP      Product      Marketing Contracts/Agreements      Searching/Reporting Contacts  
Inventory      Inventory

## Marketing

Create New Project

View/Edit Project

Search/Report Projects

View/Edit Contacts

Please choose an option from the menu bar on the left.

## INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory Inventory

Marketing Module	Create New Project
<u>Create New Project</u>	Project Name <input type="text"/> Project # 121232
<u>View/Edit Project</u>	Status <input type="text"/> Status Date <input type="text"/>
<u>Search/Report Projects</u>	Deal Value <input type="text"/> Deal Size <input type="text"/>
<u>View/Edit Contacts</u>	Include in Top Deals Report <input type="checkbox"/> Deal Priority <input type="text"/>
	Description of Project <input type="text"/>
	Follow-up Date <input type="text"/> Follow-up Actions <input type="text"/>
	Responsible Party <input type="text"/>
	Products <input type="text"/>

<u>Products</u>			
<u>Product Name</u>			
Add Product		Remove Product	
<u>Customer</u>			
<u>Customer Name</u>	<u>Contact</u>	<u>Phone</u>	<u>Party to Final Contract</u>
			<input type="checkbox"/>
Add Customers		Remove Customers	
<u>Remarketing Partners</u>			
<u>Company Name</u>	<u>Contact</u>	<u>Phone</u>	<u>Party to Final Contract</u>
			<input type="checkbox"/>
Add Partner		Remove Partner	
IP Group Personnel			

FIG. 86

<u>IP Group Personnel</u>	
<u>Name</u>	<u>Role</u>
<input type="button" value="Add IP Personnel"/>	<input type="button" value="Remove IP Personnel"/>

Associated Files Attached

File to Attach

<u>File Name</u>	<u>Comments</u>
<input type="text"/>	<input type="text"/>

Contract Records

<u>Contract Name</u>	<u>Agreement Type</u>
<input type="text"/>	<input type="text"/>

FIG. 87

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP](#)
[Product](#)
[Marketing Contracts/Agreements Searching/Reporting Contacts](#)

[Inventory](#)
[Inventory](#)

## View Projects

### Default Search

### Custom Sort

1.) Sort By:  ☒

2.) Sort By:  ☒

3.) Sort By:  ☒

[Marketing](#)  
[Module](#)

[Create New](#)  
[Project](#)

[View/Edit Project](#)

[Search/Report](#)  
[Projects](#)

[View/Edit](#)  
[Contacts](#)

FIG. 88



# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP](#)   [Product](#)   [Marketing Contracts/Agreements](#)   [Searching/Reporting](#)   [Contacts](#)  
[Inventory](#)   [Inventory](#)

## View Project-Results

*Marketing  
Module*

[Create New  
Project](#)

[View/Edit Project](#)

[Search/Report  
Projects](#)

[View/Edit  
Contacts](#)

[Project  
Name](#)  
[Data1](#)

[Customer](#)  
[Data2](#)

[Product](#)  
[Data3](#)

[Deal  
Priority](#)  
[Data4](#)

[Deal Value](#)  
[Data5](#)

[Data6](#)

FIG. 89


## INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP](#)    [Product](#)    [Marketing Contracts/Agreements](#)    [Searching/Reporting](#)    [Contacts](#)  
[Inventory](#)    [Inventory](#)

<u>Marketing Module</u>	<u>View Project</u>
<a href="#">Create New Project</a> <a href="#">View/Edit Projects</a> <a href="#">Search/Report Projects</a> <a href="#">View/Edit Contacts</a>	<div> <div>Project # 12334</div> <div>Status Date 2/2/2000</div> <div>Deal Size Small</div> <div>Deal Priority Low</div> </div> <div> <div>Project Name Name</div> <div>Status Conduct Initial Research</div> <div>Deal Value \$1.2 Billion</div> <div>Include in Top Deals Report <input type="checkbox"/></div> <div>Description of Project</div> <div></div> </div> <div> <div>Follow-up Date 2/2/2000</div> <div>Follow-up Actions Action</div> <div>Responsible Party Mike Stevens</div> </div> <div> <div><u>Products</u></div> <div> <div><u>Product Name</u></div> <div><u>Product</u></div> </div> <div><u>Customer</u></div> </div>

FIG. 90

Customer

<u>Customer Name</u>	<u>Contact</u>	<u>Phone</u>	<u>Party to Final Contract</u>
IBM	John Jim	212-555-1212	

Remarketing Partners

<u>Company Name</u>	<u>Contact</u>	<u>Phone</u>	<u>Party to Final Contract</u>
IBM	Bob Smith	212-555-1212	

IP Group Personnel

<u>Name</u>	<u>Role</u>
-------------	-------------

Associated Files Attached

<u>File Name</u>	<u>Comments</u>

Contract Records

<u>Contract Name</u>	<u>Agreement Type</u>

Edit

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP](#)   [Product](#)   [Marketing Contracts/Agreements](#)   [Searching/Reporting](#)   [Contacts](#)  
[Inventory](#)   [Inventory](#)

## Marketing Module

[Create New Project](#)

[View/Edit Project](#)

[Search/Report Projects](#)

[View/Edit Contacts](#)

## View Projects

### Default Search

### Custom Sort

1.) Sort By:

Customer Company Name

2.) Sort By:

Product Name

3.) Sort By:

Customer Company Name

N/A

Submit

Customer Company Name

Product Name

Remarking Partner Company Name

Status

Deal Priority

Deal Value

Deal Size

IP Group Personnel

## INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP      Product      Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory      Inventory

View Projects-Results*Marketing  
Module*Create New  
ProjectView/Edit ProjectSearch/Report  
ProjectsView/Edit  
Contacts

Criteria 1   Criteria 2   Criteria 3   Project #   Customer   Product  
Data1      Data2      Data3      Data4      Data5      Data6

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory Inventory

Marketing Module	Edit Project	
Create New Project	Project Name	Project #
View/Edit Project	Status	Status Date
Search/Report Projects	Deal Value	Deal Size
View/Edit Contacts	Include in Top Deals Report	Deal Priority
Description of Project		
<div> <div></div> <div></div> </div>		
Follow-up Date		
Responsible Party		
Follow-up Actions		
Products		
Product Name		

FIG. 94

Products

<u>Product Name</u>	

Add Product

Remove Product

Customer

<u>Customer Name</u>	<u>Contact</u>	<u>Phone</u>	<u>Party to Final Contract</u>

Add Customers

Remove Customers

Remarketing Partners

<u>Company Name</u>	<u>Contact</u>	<u>Phone</u>	<u>Party to Final Contract</u>
			<input type="checkbox"/>

Add Partner

Remove Partner

IP Group Personnel

FIG. 95

<u>IP Group Personnel</u>	
<u>Name</u>	<u>Role</u>
<input type="button" value="Add IP Personnel"/>	<input type="button" value="Remove IP Personnel"/>

Associated Files Attached

<input type="text"/>	<input type="button" value="Browse..."/>	<input type="button" value="Remove File"/>
----------------------	--	--

File to Attach

<u>File Name</u>	<u>Comments</u>
<input type="text"/>	<input type="text"/>

Contract Records

<u>Contract Name</u>	<u>Agreement Type</u>
<input type="text"/>	<input type="text"/>

<input type="button" value="Create Contract"/>	<input type="button" value="Add Associated Contract"/>	<input type="button" value="X"/>
<input type="button" value="Submit"/>	<input type="button" value="Cancel"/>	

FIG. 96



## INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory Inventory

Marketing  
ModuleProject Search/ReportsCreate New ProjectView/Edit ProjectSearch/Report  
ProjectsStandard Project  
Reports

- Top Deals
- Customer  
Report
- Remarketing  
Report
- Status Level  
Report
- BellSouth  
Entity  
Report

View/Edit Contacts

Project Name

Project #

Status

Status Date

Deal Value

Deal Size

Include in Top Deals Report

☐

Deal Priority

Description  
of Project

Follow-up Date

Follow-up

Actions

Responsible Party

ProductsProduct Name

<u>Report</u>		<u>Product Name</u>			
<u>View/Edit Contacts</u>					

<u>Add Product</u>		<u>Remove Product</u>	
--------------------	--	-----------------------	--

<u>Customer</u>	
<u>Customer Name</u>	<u>Phone</u>
<u>Party to Final Contract</u>	<input type="checkbox"/>

<u>Add Customer</u>	<u>Remove Customer</u>
---------------------	------------------------

<u>Remarketing Partners</u>	
<u>Company Name</u>	<u>Phone</u>
<u>Party to Final Contract</u>	<input type="checkbox"/>

<u>Add Remarketing Partner</u>	<u>Remove Remarketing Partner</u>
--------------------------------	-----------------------------------

IP Group Personnel

FIG. 98

IP Group Personnel

Name

Role

Add IP Group Personnel

Remove IP Group Personnel

Associated Files Attached

<u>File Name</u>	<u>Comments</u>

Full Text File Search

Contract Records

<u>Contract Name</u>	<u>Agreement Type</u>

Add Contract Record

Remove Contract Record

Search

Cancel

FIG. 99

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory Inventory

## Marketing Module

Create New Project

View/Edit Project

Search/Report Projects

Standard Project Reports

- Top Deals
- Customer Report
- Remarketing Report
- Status Level Report
- BellSouth Entity Report

View/Edit Contacts

## Project Search/Reports

Project Name

Project #

Status

N/A

Status Date

Deal V

Conduct Initial Research

Conduct market research and analysis

Include Complete and approve PTR

Develop marketing plan & package

Desc

Sell product

Negotiate contract

Complete & approve transaction report

Execute contract

Set up maintenance plan

Close out Project

Follo

Set up maintenance plan

Close out Project

Responsible Party

N/A

Products

Product Name

FIG. 100



# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP Inventory](#)
[Product Inventory](#)
[Marketing Contracts/Agreements](#)
[Searching/Reporting Contacts](#)

<div>Marketing Module</div>	<div>Top Deals Report</div>
<div>Create New Project</div> <div>View/Edit Project</div> <div>Search/Report Projects</div> <div>Standard Project Reports</div> <div><div><div>• Top Deals</div><div>• Customer Report</div><div>• Remarketing Report</div><div>• Status Level Report</div><div>• BellSouth Business Unit</div></div></div> <div>View/Edit Contacts</div>	<div>Status</div> <div>Data1</div> <div>Product/Project Name</div> <div>Data2</div> <div>Opp #</div> <div>Data3</div> <div>BellSouth Patent Company</div> <div>BU</div> <div>Data4</div> <div>Status</div> <div>Data5</div> <div>Lead</div> <div>Data6</div> <div>Support</div> <div>Data7</div> <div>Est. Value</div> <div>Data8</div> <div>Deal Size</div> <div>Data9</div> <div>Priority</div> <div>Data10</div> <div>Data11</div>

FIG. 102

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory Inventory

## Marketing Module

Create New Project

View/Edit Project

Search/Report Project

## Standard Project Reports

- Top Deals
- Customer Report
- Remarketing Report
- Status Level Report
- BellSouth Business Unit

View/Edit Contacts

## Customer Report

Customer Name

Customer Name

Submit

Cancel

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Inventory Product Inventory Marketing Contracts/Agreements Searching/Reporting Contacts

<u>Marketing Module</u>	<u>Customer Report</u>
<p><u>Create New Project</u></p> <p><u>View/Edit Project</u></p> <p><u>Search/Report Projects</u></p> <p>Standard Project Reports</p> <ul style="list-style-type: none"> <li>• <u>Top Deals</u></li> <li>• <u>Customer Report</u></li> <li>• <u>Remarketing Report</u></li> <li>• <u>Status Level Report</u></li> <li>• <u>BellSouth Business Unit</u></li> </ul> <p><u>View/Edit Contacts</u></p>	<p><u>Customer Name</u> Data1</p> <p><u>Product Name</u> Data2</p> <p><u>Status</u> Data3</p> <p><u>Value</u> Data4</p> <p><u>BellSouth Business Unit</u> Data5</p> <p><u>Opp #</u> Data6</p>

FIG. 103A



INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP

Product

Inventory

Inventory

Marketing Contracts/Agreements

Searching/Reporting

Contacts

Marketing Module

Create New Project

View/Edit Project

Search/Report Projects

Standard Project Reports

• Top Deals

• Customer Report

• Remarketing Report

• Status Level Report

• BellSouth Business Unit

View/Edit Contacts

Remarketing Partner Report

Remarketing Company Name

Company Name

Submit

Cancel

FIG. 104

## INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory Inventory

<u>Marketing Module</u>	<u>Remarketing Partner Report</u>					
<u>Create New Project</u>	<u>Remarketing Partner</u>	<u>Product Name</u>	<u>Status</u>	<u>Value</u>	<u>BellSouth Business Unit</u>	<u>Opp.#</u>
<u>View/Edit Project</u>	Data1	Data2	Data3	Data4	Data5	Data6
<u>Search/Report Projects</u>						
<u>Standard Project Reports</u>						
• <u>Top Deals</u>						
• <u>Customer Report</u>						
• <u>Remarketing Report</u>						
• <u>Status Level Report</u>						
• <u>BellSouth Business Unit</u>						
<u>View/Edit Contacts</u>						

FIG. 105

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP Inventory](#)
[Product Inventory](#)
[Marketing Contracts/Agreements](#)
[Searching/Reporting Contacts](#)

## Marketing Module

### Status Level Report

[Create New Project](#)

[View/Edit Project](#)

[Search/Report Projects](#)

### Standard Project Reports

- [Top Deals](#)
- [Customer Report](#)
- [Remarketing Report](#)
- [Status Level Report](#)
- [BellSouth Business Unit](#)

[View/Edit Contacts](#)

Status Level

FIG. 106

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP](#)   [Product](#)   [Marketing Contracts/Agreements](#)   [Searching/Reporting](#)   [Contacts](#)  
[Inventory](#)   [Inventory](#)

<b><u>Status Level Report</u></b>	
<div> <div>Submit</div> <div>Can</div> </div>	<div> <div>Status Level</div> <div>N/A</div> <div>N/A</div> <div> Conduct Initial Research  Conduct market research and analysis  Complete and approve PTR  Develop marketing plan &amp; package  Sell product  Negotiate contract  Complete &amp; approve transaction report  Execute contract  Set up maintenance plan  Close out Project </div> </div>

<b><u>Marketing Module</u></b> <a href="#">Create New Project</a> <a href="#">View/Edit Project</a> <a href="#">Search/Report Projects</a>	<b><u>Standard Project Reports</u></b> <ul style="list-style-type: none"> <li>• <a href="#">Top Deals</a></li> <li>• <a href="#">Customer Report</a></li> <li>• <a href="#">Remarketing Report</a></li> <li>• <a href="#">Status Level Report</a></li> <li>• <a href="#">BellSouth Business Unit</a></li> </ul>
---	---

[View/Edit Contacts](#)

FIG. 107

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory Inventory

## Marketing Module

### Status Level Report

Create New Project

View/Edit Project

Search/Report Projects

## Standard Project Reports

- Top Deals
- Customer Report
- Remarketing Report
- Status Level Report
- BellSouth Business Unit

View/Edit Contacts

<u>Level</u>	<u>Date</u>	<u>Oppt#</u>	<u>Company Name</u>	<u>Product Name</u>	<u>Remarketing Partner</u>	<u>BellSouth Business Unit</u>	<u>IP Group Personnel</u>	<u>Deal Size</u>	<u>Deal Value</u>
Data1	Data2	Data3	Data4	Data5	Data6	Data7	Data8	Data9	Data10

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP](#)   [Product](#)   [Marketing Contracts/Agreements](#)   [Searching/Reporting](#)   [Contacts](#)  
[Inventory](#)   [Inventory](#)

## BellSouth Business Unit Report

BellSouth Business Unit

Submit

Cancel

- BASC
- BBI
- BBS
- BPC
- BSC
- BSCC
- BSE
- BSI
- BSNET
- BST

*Marketing  
Module*

Create New Project

View/Edit Project

Search/Report  
Projects

**Standard Project  
Reports**

- Top Deals
- Customer
- Report
- Remarketing
- Report
- Status Level
- Report
- BellSouth
- Business
- Unit

View/Edit Contacts

FIG. 109

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory Inventory

<u>Marketing Module</u>		<u>Bell South Business Unit Report</u>							
<u>Create New Project</u> <u>View/Edit Project</u>	<u>Search/Report Projects</u>	<u>Entity Name</u>	<u>Status</u>	<u>Product Name</u>	<u>Customer Name</u>	<u>Remarketing Partner</u>	<u>Deal Value</u>	<u>BellSouth Contacts</u>	<u>BIPMARK Contact</u>
		Data1	Data2	Data3	Data4	Data5	Data6	Data7	Data8
<u>Standard Project Reports</u> <ul style="list-style-type: none"><li><u>Top Deals</u></li><li><u>Customer Report</u></li><li><u>Remarketing Report</u></li><li><u>Status Level Report</u></li><li><u>BellSouth Business Unit</u></li></ul>	<u>View/Edit Contacts</u>								

FIG. 110

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP](#)
[Product](#)
[Marketing Contracts/Agreements](#)
[Searching/Reporting](#)
[Contacts](#)  
[Inventory](#)
[Inventory](#)

## Contracts/Agreements

Please choose an option from the menu bar on the left.

[Add](#)  
[Contract/Agreement](#)  
[Search](#)  
[Contracts/Agreements](#)  
[Contract Reports](#)  
[View/Edit Contacts](#)

FIG. 111



# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP](#)   [Product](#)   [Marketing Contracts/Agreements](#)   [Searching/Reporting Contacts](#)  
[Inventory](#)   [Inventory](#)

## Contracts/Agreements Module

[Add Contract/Agreement](#)

[Search](#)  
[Contracts/Agreements](#)

[Contract Reports](#)

[View/Edit Contacts](#)

## Add Contract/Agreement

Agreement Name  Agreement Number 12323  
 Agreement Type  Project Number   
 Product

## Contract Summary

Exclusivity <input type="text"/>	Form of Agreement <input type="text"/>
Type of Revenue <input type="text"/>	Unique T&C <input type="text"/>
Frequency of Payments <input type="text"/>	
Description <input type="text"/>	

Termination or Renewal Terms

FIG. 112

TERMINATION DETAILS/60

Termination or Renewal Terms

--	--

Confidentiality Period	Notice Date
Effective Date	
Termination/Renewal Date	Reason for Termination

BellSouth Business Unit

BellSouth Business Unit	Royalty Percentage

Add BellSouth BU	Remove BellSouth BU
------------------	---------------------

Parties to the Contract

Company Name	Type	Contact

Add Party	Remove Party
-----------	--------------

FIG. 113

Add Party

Remove Party

## IP Covered by License

IP Type

Name

Ref #

Add Associated IP

Remove Associated IP

## Actions/Payments Due

Expected Due Date	Actual Date	Action Type	Expected Amount	Actual Amount	Expected Action	Actual Action	Internal Contact	External Contact	Comments

Add Action Item

Remove Action Item

Add Internal Party

Add External Party

Comments

0950130-0131301

Comments

File to Attach

Browse...

Remove File

File Name	Comments

Submit

Cancel

FIG. 115

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory Inventory

Contracts/Agreements  
*Module*

Add Contract/Agreement

Add Contract/Agreement

Search  
Contracts/Agreements

Contract Reports

View/Edit Contacts

Agreement Name

Agreement Number 12323

Agreement Type

Project Number

- Administrative Services Agreement
- Master Licensing Agreement
- Sublicensing Agreement
- Services Agreement
- Sublease Agreement
- Consulting Agreements
- Recruiter Agreement
- Remarketing Agreements

Form of

Agreement

Type of Revenue

Unique T&C

Frequency of Payments

Description

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP Inventory](#)
[Product Inventory](#)
[Marketing Contracts/Agreements](#)
[Searching/Reporting Contacts](#)

## Contracts/Agreements Module

[Add Contract/Agreement](#)

[Search Contracts/Agreements](#)

[Contract Reports](#)

[View/Edit Contacts](#)

## Add Contract/Agreement

Agreement Name  Agreement Number 12323  
 Agreement Type  Project Number   
 Product

## Contract Summary

Exclusivity <input type="text"/>	Form of Agreement <input type="text"/>
Type of Revenue <input type="text"/>	Unique T&C <input type="text"/>
Frequency of Payments <input type="text"/>	Distribution License Straight Use License Strategic Agreement
Description <input type="text"/>	<input type="text"/>

FIG. 117

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory Inventory

Contracts/Agreements  
Module

Add Contract/Agreement

Add Contract/Agreement

Search  
Contracts/Agreements

Contract Reports

View/Edit Contacts

Agreement Name  Agreement Number 12323

Agreement Type  Project Number

Product

Contract Summary

Exclusivity <input type="text"/>	Form of Agreement <input type="text"/>
Type of Revenue <input type="text"/>	Unique T&C <input type="text"/>
Frequency of Pay <input type="text"/>	Cash <input type="text"/>
	Savings <input type="text"/>
	Cash & Savings <input type="text"/>
Description <input type="text"/>	

FIG. 118

## INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product  
Inventory Inventory Marketing Contracts/Agreements Searching/Reporting Contacts

Contracts/Agreements ModuleAdd Contract/AgreementSearch  
Contracts/AgreementsContract ReportsView/Edit ContactsAdd Contract/Agreement

Agreement Name  Agreement Number 12323  
 Agreement Type  Project Number   
 Product

Contract Summary

Exclusivity <input type="checkbox"/>	Form of Agreement <input type="checkbox"/>
Type of Revenue <input type="checkbox"/>	Unique T&C <input type="checkbox"/>
Frequency of Payments <input type="checkbox"/>	
One-time Development/Maintenance Savings One Time Up-Front License Fee One Time Up-Front License Fee w/ Future Royalties Due Monthly Report/Royalty Payment Quarterly Report/Royalty Payment Annual Report/Royalty Payment	



# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP Inventory](#)
[Product Inventory](#)
[Marketing](#)
[Contracts/Agreements](#)
[Searching/Reporting](#)
[Contacts](#)

*Contracts/Agreements  
Module*

## Add Action

Action Type	Termination Notice <input checked="" type="checkbox"/>	Expected Due Date	<input type="text"/>
Expected Amount	<input type="text"/>	Start of Period	<input type="text"/>
Expected Action	<input type="text"/>	End of Period	<input type="text"/>
Internal Contact	<input type="text"/>	External Contact	<input type="text"/>

### Recurring Actions

Date	<input type="text"/>	Repeat	<input type="text"/>
------	----------------------	--------	----------------------

Comments:

<input type="text"/>
----------------------

Submit

Cancel

FIG. 120

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP Inventory](#)
[Product Inventory](#)
[Marketing Contracts/Agreements Searching/Reporting Contacts](#)

*Contracts/Agreements Module*

## Add Action

Action Type	Termination Notice <input type="checkbox"/>	Expected Due Date	<input type="text"/>
Expected Action	Termination Notice Extension Notice	Start of Period	<input type="text"/>
Expected Action	Report REQ'T	End of Period	<input type="text"/>
Internal Cont	Payment REQ'T	External Contact	<input type="text"/>
	Savings Due		
	Other		

## Recurring Actions

Date	<input type="text"/>	Repeat	<input type="text"/>
------	----------------------	--------	----------------------

Comments:

<input type="text"/>	<input type="text"/>
----------------------	----------------------

Submit

Cancel

FIG. 120A

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP](#)    [Product](#)    [Marketing Contracts/Agreements](#)    [Searching/Reporting Contracts](#)  
[Inventory](#)    [Inventory](#)

<a href="#">Contracts/Agreements Module</a>	<a href="#">Search Contracts/Agreements</a>	
<a href="#">Add Contract/Agreement</a> <a href="#">Search Contracts/Agreements</a> <a href="#">Contract Reports</a> <a href="#">View/Edit Contracts</a>	<div> <div>Agreement Name</div> <div>Agreement Number</div> </div> <div> <div>Agreement Type</div> <div>Project Number</div> </div> <div> <div>Product</div> </div>	
<a href="#">Contract Summary</a>		
<div> <div>Exclusivity</div> <div>Type of Revenue</div> <div>Frequency of Payments</div> <div>Description</div> </div> <div> <div>Form of Agreement</div> <div>Unique T&amp;C</div> </div>		

FIG. 121

Description

Termination or Renewal Terms

<input type="text"/>	<input type="text"/>
----------------------	----------------------

Confidentiality Period <input type="text"/>	Notice Date <input type="text"/>
Effective Date <input type="text"/>	
Termination/Renewal Date <input type="text"/>	Reason for Termination <input type="text"/>

BellSouth Business Units

BellSouth Business Unit <input type="text"/>	Royalty Percentage <input type="text"/>
--	---

Add BellSouth BU	Remove BellSouth BU
------------------	---------------------

Parties to the Contract

Company Name <input type="text"/>	Type <input type="text"/>	Contact <input type="text"/>
-----------------------------------	---------------------------	------------------------------

Add Party	Remove Party
-----------	--------------

Add Party

Remove Party

## IP Covered by License

IP Type	Name	Ref #
<input type="text"/>	<input type="text"/>	<input type="text"/>

Add IP

Remove IP

## Actions/Payments Due

Expected Due Date	Actual Date	Action Type	Expected Amount	Actual Amount	Expected Action	Actual Action	Internal Contact	External Contact	Comments
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Add Action

Remove Action

## Comments

<input type="text"/>	<input type="text"/>
----------------------	----------------------

Full Text File Search

Submit

Cancel

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP](#)    [Product](#)    [Marketing Contracts/Agreements Searching/Reporting Contacts](#)  
[Inventory](#)    [Inventory](#)

<u>Search Results</u>	
<a href="#">Add Contract/Agreement</a>	
<a href="#">Search Contracts/Agreements</a>	
<a href="#">Contract Reports</a>	
<a href="#">View/Edit Contacts</a>	
	<a href="#">Agreement</a> <a href="#">Name</a> <a href="#">Agreement</a> <a href="#">Data1</a> <a href="#">Number</a> <a href="#">Data2</a> <a href="#">Type</a> <a href="#">Data3</a> <a href="#">Project #</a> <a href="#">Data4</a>

FIG. 124

## INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP](#)    [Product](#)  
[Inventory](#)    [Inventory](#)    [Marketing Contracts/Agreements](#)    [Searching/Reporting Contacts](#)

### Contracts/Agreements *Module*

[Add Contract/Agreement](#)

[Search](#)

[Contracts/Agreements](#)

[Contract Reports](#)

[View/Edit Contacts](#)

### Contract/Agreement

Agreement Name Name                      Agreement Number 12323

Agreement Type Contract                      Project Number 1234

Product Product

### Contract Summary

Exclusivity Exclusive	Form of Agreement    Straight Use License
Type of Revenue Cash	Unique T&C Text
Frequency of Payments Annual Report/Royalty Payment	
Description A nice piece of IP	

[Termination or Renewal Terms](#)



Confidentiality Period 2/14/2000

Notice Date 2/14/2000

Confidentiality Period 2/14/2000	Notice Date 2/14/2000
Effective Date 2/14/2000	
Termination/Renewal Date 2/14/2000	Reason for Termination None

## BellSouth Business Unit

BellSouth Business Unit	Royalty Percentage
Cellular	100

## Parties to the Contract

Company Name	Type	Contact
Party	Remarking	Carter Pate

## IP Covered by License

IP Type	Name	Ref #
Patent	Cell Phone	1234

## Actions/Payments Due



# Actions/Payments Due

Expected Due Date	Actual Date	Action Type	Expected Amount	Actual Amount	Expected Action	Actual Action	Internal Contact	External Contact	Comments
		<input type="text"/>							

## Comments

## File Name

## Comments

Edit

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP    Product    Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory    Inventory

Contracts/Agreements  
Module

Add Contract/Agreement  
Search  
Contracts/Agreements  
Contract Reports  
View/Edit Contacts

## Edit Contract/Agreement

Agreement Name  Agreement Number 12323  
Agreement Type  Project Number   
Product

## Contract Summary

Exclusivity <input type="text"/>	Form of Agreement <input type="text"/>
Type of Revenue <input type="text"/>	Unique T&C <input type="text"/>
Frequency of Payments <input type="text"/>	<input type="text"/>
Description <input type="text"/>	<input type="text"/>

Termination or Renewal Terms

FIG. 128

Termination or Renewal Terms

--	--

Confidentiality Period		Notice Date	
Effective Date			
Termination/Renewal Date		Reason for Termination	

BellSouth Business Units

<u>BellSouth Business Unit</u>	<u>Royalty Percentage</u>

Add BellSouth BU	Remove BellSouth BU
------------------	---------------------

Parties to the Contract

<u>Company Name</u>	<u>Type</u>	<u>Contact</u>

Add Party	Remove Party
-----------	--------------

IP Covered by License

## IP Covered by License

IP Type	Name	Ref #
---------	------	-------

Add Associated IP Remove Associated IP

## Action/Payments Due

Expected Due Date	Actual Date	Action Type	Expected Amount	Actual Amount	Expected Action	Actual Action	Internal Responsible Party	External Responsible Party	Comments

Add Action Item Remove Action Item Add Internal Party Add External Party

## Comments

<u>Comments</u>	
<div><div></div><div></div></div>	
<div>File to Attach</div>	<div><div>Browse...</div><div>Remove File</div></div>
<div><u>File Name</u></div>	<div><u>Comments</u></div>
<div>Submit</div>	<div>Cancel</div>

FIG. 131

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory Inventory

<u>Contract/Agreements Module</u>	<u>Contracts Reports</u>
<u>Add Contract/Agreement</u>  <u>Search</u> <u>Contracts/Agreements</u>  <u>Contract Reports</u>  <u>Upcoming</u> <u>Termination Report</u> <u>Royalty/Reporting</u> <u>Requirements By</u> <u>Date</u> <u>Contracts By</u> <u>BellSouth Business</u> <u>Unit</u> <u>Financial Report By</u> <u>Period</u>	<p>Please select a report from the left menu bar.</p>

FIG. 132

Please select a report from the left menu bar.

- Search
- Contracts/Agreements
- Contract Reports
- Upcoming
- Termination Report
- Royalty/Reporting
- Requirements By
- Date
- Contracts By
- BellSouth Business
- Unit
- Financial Report By
- Period
- Financial Report By
- BellSouth Business
- Unit
- Action Report
- Party Report
- View/Edit Contacts

FIG. 133

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory Inventory

## Contract/Agreements Module

Add Contract/Agreement

Search  
Contracts/Agreements

Contract Reports

Upcoming

Termination

Report

Royalty/Reporting

Requirements By

Date

Contracts By

BellSouth

Business Unit

Financial Report

By Period

## Upcoming Termination Report

Agreement Type

Period Covered By Report:

Start Date

End Date

OR

Time Period

FIG. 134



# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contracts  
Inventory Inventory

Contract/Agreements  
Module

Add Contract/Agreement

Search  
Contracts/Agreements

Contract Reports

Upcoming

Termination

Report

Royalty/Reporting

Requirements By

Date

Contracts By

BellSouth

Business Unit

Financial Report

By Period

Upcoming Termination Report

Agreement Type

port:

Contract

Internal Use

Marketing (External)

IPCO/Affiliates

All

.....

Search

Cancel

End Date

FIG. 135

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP](#)   [Product](#)  
[Inventory](#)   [Inventory](#)   [Marketing Contracts/Agreements](#)   [Searching/Reporting Contracts](#)

<a href="#">Contract/Agreements Module</a>	<a href="#">Upcoming Termination Report</a>
<a href="#">Add Contract/Agreement</a> <a href="#">Search Contracts/Agreements</a> <a href="#">Contract Reports</a> <a href="#">Upcoming Termination Report</a> <a href="#">Royalty/Reporting Requirements By</a> <a href="#">Date</a> <a href="#">Contracts By</a> <a href="#">BellSouth</a> <a href="#">Business Unit</a> <a href="#">Financial Report</a> <a href="#">By Period</a>	<div> <a href="#">Agreement Type</a> </div> <div> <a href="#">Period Covered By Report:</a>  <div> <div>Start Date</div> <div>End Date</div> </div> OR  <div> <div>Time Period</div> <div> <a href="#">Next 30 Days</a>  <a href="#">Next 60 Days</a>  <a href="#">Next Year</a> </div> </div> </div> <div> <div>Search</div> <div>Cal</div> </div>

FIG. 136

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory Inventory

<u>Contract/Agreements Module</u>	<u>Upcoming Termination Report</u>
<u>Add Contract/Agreement</u>	
<u>Search</u>	
<u>Contracts/Agreements</u>	
<u>Contract Reports</u>	
<u>Upcoming</u>	
<u>Termination Report</u>	
<u>Royalty/Reporting</u>	
<u>Requirements By</u>	
<u>Date</u>	
<u>Contracts By</u>	
<u>BellSouth Business</u>	
<u>Unit</u>	
<u>Financial Report By</u>	
<u>Period</u>	
	<u>Effective</u> <u>Date</u> Data1
	<u>Notice</u> <u>Date</u> Data2
	<u>Termination</u> <u>Date</u> Data3
	<u>Contract</u> <u>Name</u> Data4
	<u>Contract #</u> Data5
	<u>Customer</u> Data6

FIG. 137

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product  
Inventory Inventory Marketing Contracts/Agreements Searching/Reporting Contacts

## Royalty/Reporting Requirements By Date Report

Add Contract/Agreement

Search  
Contracts/Agreements

Contract Reports

Upcoming

Termination

Report

Royalty/Reporting

Requirements By

Date

Contracts By

BellSouth

Business Unit

Financial Report

By Period

Agreement Type

Period Covered By Report:

Start Date

End Date

OR

Time Period

Search

Cancel

FIG. 138

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP      Product      Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory      Inventory

<u>Contract/Agreement Module</u>	<u>Royalty/Reporting Requirements By Date Report</u>
<u>Add Contract/Agreement</u>	
<u>Search Contracts/Agreements</u>	
<u>Contract Reports</u>	
<u>Upcoming Termination Report</u>	
<u>Royalty/Reporting Requirements By Date</u>	
<u>Contracts By</u>	
<u>BellSouth Business</u>	
<u>Unit</u>	
<u>Financial Report By</u>	
<u>Period</u>	
<u>Financial Report By</u>	
<u>BellSouth Business</u>	
<u>Unit</u>	

FIG. 139

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory Inventory

## Contract/Agreements Module

Add Contract/Agreement

Search Contracts/Agreements

Contract Reports

Upcoming Termination  
Report

Royalty/Reporting

Requirements By Date

Contracts By BellSouth

Business Unit

Financial Report By

Period

Financial Report By

BellSouth Business

Unit

Action Report

## Contracts By BellSouth Business Unit

Agreement Type

BellSouth Business Unit

Period Covered By Report:

Start Date

End Date

OR

Time Period

Search

Cancel

FIG. 140

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP      Product      Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory      Inventory

<u>Contract/Agreement Module</u>	<u>Contracts By BellSouth Business Unit</u>
<u>Add Contract/Agreement</u>	<u>Period Covered By Report:</u> <u>Date Report Run:</u>
<u>Search Contracts/Agreements</u>	<div> <u>BellSouth Business Unit</u>    <u>Agreement Name</u>    <u>Product</u>    <u>Parties</u>    <u>Effective Date</u>    <u>Termination Date</u> </div>
<u>Contract Reports</u>	<div> <u>Data</u>    <u>Data</u>    <u>Data</u>    <u>Data</u>    <u>Data</u>    <u>Data</u> </div>
<u>Upcoming Termination Report</u>	
<u>Royalty/Reporting Requirements By Date</u>	
<u>Contracts By BellSouth Business Unit</u>	
<u>Financial Report By Period</u>	
<u>Financial Report By BellSouth Business Unit</u>	
<u>Action Report</u>	

FIG. 141

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contracts  
Inventory Inventory

<u>Contract/Agreements Module</u>	<u>Financial Report By Period</u>
<u>Add Contract/Agreement</u> <u>Search Contracts/Agreements</u> <u>Contract Reports</u> <u>Upcoming</u> <u>Termination</u> <u>Report</u> <u>Royalty/Reporting</u> <u>Requirements By</u> <u>Date</u> <u>Contracts By</u> <u>BellSouth</u> <u>Business Unit</u> <u>Financial Report</u> <u>By Period</u>	<u>Agreement Type</u> <input type="text"/> <u>Period Covered By Report:</u> <u>Start Date</u> <input type="text"/> <u>End Date</u> <input type="text"/> OR <u>Time Period</u> <input type="text"/> <input type="button" value="v"/> <input type="button" value="Search"/> <input type="button" value="Cancel"/>

FIG. 142



# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP      Product      Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory      Inventory

<u>Contract/Agreement Module</u>	<u>Financial Report By Period</u>												
<u>Add Contract/Agreement</u>	<u>Period Covered By Report:</u> <u>Date Report Run:</u>  <table><tr><td><u>Contract Name</u></td><td><u>BellSouth Business Unit</u></td><td><u>Parties</u></td><td><u>Amount Due</u></td><td><u>Date Due</u></td><td><u>External Contact</u></td></tr><tr><td>Data</td><td>Data</td><td>Data</td><td>Data</td><td>Data</td><td>Data</td></tr></table>	<u>Contract Name</u>	<u>BellSouth Business Unit</u>	<u>Parties</u>	<u>Amount Due</u>	<u>Date Due</u>	<u>External Contact</u>	Data	Data	Data	Data	Data	Data
<u>Contract Name</u>		<u>BellSouth Business Unit</u>	<u>Parties</u>	<u>Amount Due</u>	<u>Date Due</u>	<u>External Contact</u>							
Data		Data	Data	Data	Data	Data							
<u>Search Contracts/Agreements</u>													
<u>Contract Reports</u>													
<u>Upcoming Termination Report</u>													
<u>Royalty/Reporting Requirements By Date</u>													
<u>Contracts By BellSouth Business Unit</u>													
<u>Financial Report By Period</u>													
<u>Financial Report By BellSouth Business Unit</u>													
<u>Action Report</u>													

FIG. 143

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP](#)   [Product](#)   [Marketing Contracts/Agreements](#)   [Searching/Reporting Contacts](#)  
[Inventory](#)   [Inventory](#)

<u>Contract/Agreements</u> <b>Module</b>	<u>Financial Report By BellSouth Business Unit</u>
<a href="#">Add Contract/Agreement</a> <a href="#">Search Contracts/Agreements</a> <a href="#">Contract Reports</a> <a href="#">Upcoming Termination Report</a> <a href="#">Royalty/Reporting Requirements By Date</a> <a href="#">Contracts By BellSouth Business Unit</a> <a href="#">Financial Report By Period</a> <a href="#">Financial Report By BellSouth Business Unit</a> <a href="#">Action Report</a> <a href="#">Party Report</a>	<div> <a href="#">Agreement Type</a> <a href="#">BellSouth BU</a> </div> <div> <u>Period Covered By Report:</u>  <div> <a href="#">Start Date</a> <a href="#">End Date</a> </div> OR  <div> <a href="#">Time Period</a> </div> </div> <div> <a href="#">Search</a> <a href="#">Cancel</a> </div>

FIG. 144

## INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP      Product  
Inventory    Inventory      Marketing Contracts/Agreements    Searching/Reporting Contacts

<u>Contract/Agreement Module</u>	<u>Financial Report By BellSouth Business Unit</u>																		
<u>Add Contract/Agreement</u>	<u>Period Covered By Report:</u> <u>Date Report Run:</u>  <table><tr><td><u>BellSouth Business Unit</u></td><td><u>Agreement Name</u></td><td><u>Expected Amount</u></td><td><u>Actual Amount</u></td><td><u>Date Due</u></td><td><u>External Contact</u></td></tr><tr><td><u>Parties</u></td><td><u>Name</u></td><td><u>Amount</u></td><td><u>Amount</u></td><td><u>Due</u></td><td><u>Contact</u></td></tr><tr><td><u>Data</u></td><td><u>Data</u></td><td><u>Data</u></td><td><u>Data</u></td><td><u>Data</u></td><td><u>Data</u></td></tr></table>	<u>BellSouth Business Unit</u>	<u>Agreement Name</u>	<u>Expected Amount</u>	<u>Actual Amount</u>	<u>Date Due</u>	<u>External Contact</u>	<u>Parties</u>	<u>Name</u>	<u>Amount</u>	<u>Amount</u>	<u>Due</u>	<u>Contact</u>	<u>Data</u>	<u>Data</u>	<u>Data</u>	<u>Data</u>	<u>Data</u>	<u>Data</u>
<u>BellSouth Business Unit</u>		<u>Agreement Name</u>	<u>Expected Amount</u>	<u>Actual Amount</u>	<u>Date Due</u>	<u>External Contact</u>													
<u>Parties</u>		<u>Name</u>	<u>Amount</u>	<u>Amount</u>	<u>Due</u>	<u>Contact</u>													
<u>Data</u>		<u>Data</u>	<u>Data</u>	<u>Data</u>	<u>Data</u>	<u>Data</u>													
<u>Search Contracts/Agreements</u>																			
<u>Contract Reports</u>																			
<u>Upcoming Termination Report</u>																			
<u>Royalty/Reporting Requirements By Date</u>																			
<u>Contracts By BellSouth Business Unit</u>																			
<u>Financial Report By Period</u>																			
<u>Financial Report By BellSouth Business Unit</u>																			
<u>Action Report</u>																			

FIG. 145

## INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP    Product    Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory    Inventory

<u>Contract/Agreement Module</u>	<u>Action Report</u>
<u>Add Contract/Agreement</u>	<u>Agreement Type</u> <input type="text"/>
<u>Search Contracts/Agreements</u>	<u>Action Type</u> <input type="text"/>
<u>Contract Reports</u>	<u>Period Covered By Report:</u>
<u>Upcoming Termination Report</u>	<u>Start Date</u> <input type="text"/> <u>End Date</u> <input type="text"/>
<u>Royalty/Reporting</u>	OR
<u>Requirements By Date</u>	<u>Time Period</u> <input type="text"/>
<u>Contracts By BellSouth</u>	<u>Sort By:</u>
<u>Business Unit</u>	<u>Sort 1:</u> <input type="text"/>
<u>Financial Report By</u>	<u>Sort 2:</u> <input type="text"/>
<u>Period</u>	<u>Sort 3:</u> <input type="text"/>
<u>Financial Report By</u>	<input type="button" value="Search"/> <input type="button" value="Cancel"/>
<u>BellSouth Business</u>	
<u>Unit</u>	
<u>Action Report</u>	

FIG. 146

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory Inventory

<u>Contract/Agreement Module</u>	<u>Action Report</u>
<u>Add Contract/Agreement</u>	<u>Agreement Type</u> <input type="text"/>
<u>Search Contracts/Agreements</u>	<u>Action Type</u> <input type="text"/>
<u>Contract Reports</u>	<u>Period Covered By Report:</u>
<u>Upcoming Termination Report</u>	<u>Start Date</u> <input type="text"/>
<u>Royalty/Reporting Requirements By Date</u>	OR
<u>Contracts By BellSouth Business Unit</u>	<u>Time Period</u> <input type="text"/>
<u>Financial Report By Period</u>	<u>Sort By:</u>
<u>Financial Report By BellSouth Business Unit</u>	<u>Sort 1:</u> <input type="text"/>
<u>Financial Report By BellSouth Business Unit</u>	<u>Sort 2:</u> <input type="text"/>
<u>Financial Report By BellSouth Business Unit</u>	<u>Sort 3:</u> <input type="text"/>
<u>Unit</u>	<input type="text"/>
<u>Action Report</u>	<input type="text"/>
<u>End Date</u>	<input type="text"/>
<u>Internal Responsible Party</u>	<input type="text"/>
<u>External Responsible Party</u>	<input type="text"/>
<u>Due Date</u>	<input type="text"/>
<u>Contract Name</u>	<input type="text"/>
<u>Search</u>	<input type="text"/>

FIG. 147

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP      Product  
Inventory   Inventory      Marketing Contracts/Agreements Searching/Reporting Contacts

<u>Contract/Agreement Module</u>	<u>Action Report</u>
<u>Add Contract/Agreement</u> <u>Search Contracts/Agreements</u> <u>Contract Reports</u> <u>Upcoming</u> <u>Termination</u> <u>Report</u> <u>Royalty/Reporting</u> <u>Requirements By</u> <u>Date</u> <u>Contracts By</u> <u>BellSouth</u> <u>Business Unit</u> <u>Financial Report</u> <u>By Period</u>	<p>Period Covered By Report:      Date Report Run:</p> <p> <u>Expected Agreement</u>   <u>Action</u>   <u>Expected</u>   <u>Expected</u>   <u>Internal</u>   <u>External</u>  <u>Due Date</u>   <u>Name</u>   <u>Type</u>   <u>Action</u>   <u>Amount</u>   <u>Contact</u>   <u>Contact</u>  <u>Data</u>   <u>Data</u>   <u>Data</u>   <u>Data</u>   <u>Data</u>   <u>Data</u>   <u>Data</u> </p>

FIG. 148

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory Inventory

<u>Contract/Agreements</u> <u>Module</u>	<u>Party Report</u>
<u>Add Contract/Agreement</u> <u>Search</u> <u>Contracts/Agreements</u>	<u>Agreement Type</u> <input type="text"/> <u>Parties</u> <input type="text"/> <u>Add Party</u>
<u>Contract Reports</u>	<u>Period Covered By Report:</u>
<u>Upcoming</u>	<u>Start Date</u> <input type="text"/> <u>End Date</u> <input type="text"/>
<u>Termination Report</u>	<u>OR</u>
<u>Royalty/Reporting</u>	<u>Time Period</u> <input type="text"/>
<u>Requirements By</u>	<input type="button" value="Search"/> <input type="button" value="Cancel"/>
<u>Date</u> <u>Contracts By</u> <u>BellSouth Business</u> <u>Unit</u> <u>Financial Report By</u> <u>Period</u>	

FIG. 149

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory Inventory

<u>Contract/Agreements</u> <u>Module</u>	<u>Party Report</u>
<u>Add Contract/Agreement</u>	<u>Period Covered By Report:</u> <u>Date Report Run:</u>
<u>Search</u> <u>Contracts/Agreements</u>	
<u>Contract Reports</u>	<u>Parties</u> <u>Agreement</u> <u>BellSouth</u> <u>Amount</u> <u>External</u> <u>Data</u> <u>Name</u> <u>Business</u> <u>Due</u> <u>Contact</u> <u>Data</u> <u>Data</u> <u>Unit</u> <u>Data</u> <u>Data</u>
<u>Upcoming</u>	
<u>Termination Report</u>	
<u>Royalty/Reporting</u>	
<u>Requirements By</u>	
<u>Date</u>	
<u>Contracts By</u>	
<u>BellSouth Business</u>	
<u>Unit</u>	
<u>Financial Report By</u>	
<u>Period</u>	

FIG. 150



# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP   Product   Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory   Inventory

## Searching/Reporting Module

### Contract Reports

Upcoming Termination Report

Royalty/Reporting

Requirements By Date

Contracts By BellSouth Entity

Report

Financial Report By Period

Financial Report By BellSouth

Entity

Action Report

Party Report

### Standard Project Reports

Top Deals

Customer Report

Remarketing Report

Status Level Report

BellSouth Entity Report

## Cross Module Searching

FIG. 151

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP Product Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory Inventory

<u>Reporting Module</u>	<u>Cross Module Searching</u>
<u>Contract Reports</u>  <u>Upcoming</u> <u>Termination</u> <u>Report</u> <u>Royalty/Reporting</u> <u>Requirements By</u> <u>Date</u> <u>Contracts By</u> <u>BellSouth Entity</u> <u>Report</u> <u>Financial Report</u> <u>By Period</u> <u>Financial Report</u> <u>By BellSouth</u> <u>Entity</u>	<p><u>Output Display:</u></p> <div> <div>Item1</div> <div>Item2</div> <div>Item3</div> <div>Item4</div> <div>Item5</div> </div> <p><u>Where:</u></p> <div> <div>Criteria 1</div> <div>Criteria 2</div> <div>Operator and</div> <div>=</div> <div>=</div> </div> <div> <div>Search</div> <div>Cancel</div> </div>

FIG. 152

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP   Product   Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory Inventory

<u>Reporting Module</u>		<u>Cross Module Searching</u>	
<u>Contract Reports</u>  <u>Upcoming</u> <u>Termination</u> <u>Report</u> <u>Royalty/Reporting</u> <u>Requirements By</u> <u>Date</u> <u>Contracts By</u> <u>By/By South Entity</u> <u>Report</u> <u>Financial Report</u> <u>By Period</u> <u>Financial Report</u> <u>By By/By South</u> <u>Entity</u>		<u>Output Display:</u>  <div> <div>Item1</div> <div>Item2</div> <div>Item3</div> <div>Item4</div> <div>Item5</div> </div> <div> <div>Patents</div> <div>Trademarks</div> <div>Trade Secrets</div> <div>Copyrights</div> <div>.</div> </div> <div> <u>Where:</u>  <div>Patents</div> <div>Trademarks</div> <div>Trade Secrets</div> <div>Copyrights</div> <div>Products</div> <div>Marketing Opportunities</div> <div>Contracts</div> </div> <div> <div>Operator</div> <div>Search</div> <div>Cancel</div> </div>	

FIG. 153

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP   Product   Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory Inventory

<u>Reporting Module</u>		<u>Cross Module Searching</u>																																				
<u>Contract Reports</u> <u>Upcoming</u> <u>Termination</u> <u>Report</u> <u>Royalty/Reporting</u> <u>Requirements By</u> <u>Date</u> <u>Contracts By</u> <u>BellSouth Entity</u> <u>Report</u> <u>Financial Report</u> <u>By Period</u> <u>Financial Report</u> <u>By BellSouth</u> <u>Entity</u>		<u>Output Display:</u> <table border="1"> <tr> <td>Item1</td> <td>Patents</td> </tr> <tr> <td>Item2</td> <td>Trademarks</td> </tr> <tr> <td>Item3</td> <td>Trade Secrets</td> </tr> <tr> <td>Item4</td> <td>Copyrights</td> </tr> <tr> <td>Item5</td> <td>Products</td> </tr> </table> <u>Where:</u> <table border="1"> <tr> <td>Criteria 1</td> <td>Patent App#</td> </tr> <tr> <td>Criteria 2</td> <td>Patent Docket #</td> </tr> <tr> <td></td> <td>Trademark Name</td> </tr> <tr> <td></td> <td>Trademark Application #</td> </tr> <tr> <td></td> <td>Trademark Docket #</td> </tr> <tr> <td></td> <td>Trade Secret Name</td> </tr> <tr> <td></td> <td>Copyright Name</td> </tr> <tr> <td></td> <td>BellSouth Entity</td> </tr> <tr> <td></td> <td>Product Name</td> </tr> <tr> <td></td> <td>BellSouth Business Unit</td> </tr> </table> <table border="1"> <tr> <td>Operator</td> <td>and</td> <td></td> </tr> </table> <table border="1"> <tr> <td>Search</td> <td>Cancel</td> </tr> </table>		Item1	Patents	Item2	Trademarks	Item3	Trade Secrets	Item4	Copyrights	Item5	Products	Criteria 1	Patent App#	Criteria 2	Patent Docket #		Trademark Name		Trademark Application #		Trademark Docket #		Trade Secret Name		Copyright Name		BellSouth Entity		Product Name		BellSouth Business Unit	Operator	and		Search	Cancel
Item1	Patents																																					
Item2	Trademarks																																					
Item3	Trade Secrets																																					
Item4	Copyrights																																					
Item5	Products																																					
Criteria 1	Patent App#																																					
Criteria 2	Patent Docket #																																					
	Trademark Name																																					
	Trademark Application #																																					
	Trademark Docket #																																					
	Trade Secret Name																																					
	Copyright Name																																					
	BellSouth Entity																																					
	Product Name																																					
	BellSouth Business Unit																																					
Operator	and																																					
Search	Cancel																																					

FIG. 154

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP    Product    Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory Inventory

<u>Reporting Module</u>		<u>Cross Module Searching</u>																																													
<u>Contract Reports</u> <u>Upcoming</u> <u>Termination</u> <u>Report</u> <u>Royalty/Reporting</u> <u>Requirements By</u> <u>Date</u> <u>Contracts By</u> <u>BellSouth Entity</u> <u>Report</u> <u>Financial Report</u> <u>By Period</u> <u>Financial Report</u> <u>By BellSouth</u> <u>Entity</u>		<u>Output Display:</u> <table border="1"> <tr> <td>Item1</td> <td>Patents</td> <td>Trademark Application #</td> </tr> <tr> <td>Item2</td> <td>Trademarks</td> <td>Trademark Docket #</td> </tr> <tr> <td>Item3</td> <td>Trade Secrets</td> <td>Trade Secret Name</td> </tr> <tr> <td>Item4</td> <td>Copyrights</td> <td>Copyright Name</td> </tr> <tr> <td>Item5</td> <td>Products</td> <td>BellSouth Entity</td> </tr> <tr> <td></td> <td></td> <td>Product Name</td> </tr> <tr> <td></td> <td></td> <td>BellSouth Business Unit</td> </tr> <tr> <td></td> <td></td> <td>Contacts</td> </tr> <tr> <td></td> <td></td> <td>Opportunity Name</td> </tr> <tr> <td></td> <td></td> <td>Agreement Name</td> </tr> <tr> <td></td> <td></td> <td>Agreement Type</td> </tr> <tr> <td></td> <td></td> <td>BellSouth Business Unit</td> </tr> </table> <u>Where:</u> <table border="1"> <tr> <td>Criteria 1</td> <td></td> </tr> <tr> <td>Criteria 2</td> <td></td> </tr> </table> <table border="1"> <tr> <td>Operator</td> <td>and</td> </tr> </table> <table border="1"> <tr> <td>Search</td> <td>Cancel</td> </tr> </table>		Item1	Patents	Trademark Application #	Item2	Trademarks	Trademark Docket #	Item3	Trade Secrets	Trade Secret Name	Item4	Copyrights	Copyright Name	Item5	Products	BellSouth Entity			Product Name			BellSouth Business Unit			Contacts			Opportunity Name			Agreement Name			Agreement Type			BellSouth Business Unit	Criteria 1		Criteria 2		Operator	and	Search	Cancel
Item1	Patents	Trademark Application #																																													
Item2	Trademarks	Trademark Docket #																																													
Item3	Trade Secrets	Trade Secret Name																																													
Item4	Copyrights	Copyright Name																																													
Item5	Products	BellSouth Entity																																													
		Product Name																																													
		BellSouth Business Unit																																													
		Contacts																																													
		Opportunity Name																																													
		Agreement Name																																													
		Agreement Type																																													
		BellSouth Business Unit																																													
Criteria 1																																															
Criteria 2																																															
Operator	and																																														
Search	Cancel																																														

FIG. 155

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP   Product   Marketing Contracts/Agreements   Searching/Reporting Contacts  
Inventory   Inventory

<u>Reporting Module</u>	<u>Cross Module Searching</u>
<u>Contract Reports</u>	<u>Marketing</u>
<u>Upcoming Termination</u>	<u>Name</u>
<u>Report</u>	<u>Data</u>
<u>Royalty/Reporting</u>	<u>Customer</u>
<u>Requirements By Date</u>	<u>Data</u>
<u>Contracts By BellSouth</u>	<u>Contracts</u>
<u>Entity Report</u>	<u>Name</u>
<u>Financial Report By</u>	<u>Data</u>
<u>Period</u>	<u>Parties</u>
<u>Financial Report By</u>	<u>Data</u>
<u>BellSouth Entity</u>	
<u>Action Report</u>	
<u>Party Report</u>	
<u>Standard Project</u>	
<u>Reports</u>	
<u>Top Deals</u>	

FIG. 156

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP   Product   Marketing Contracts/Agreements   Searching/Reporting   Contacts  
Inventory   Inventory

View/Edit Contact

View/Edit  
Contacts

Search for Contact

Add Contact

FIG. 157

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

IP   Product   Marketing Contracts/Agreements Searching/Reporting Contacts  
Inventory   Inventory

<u>Create Contacts</u>	<u>Search for Contacts</u>		
<u>View/Edit Contacts</u>	Company Name	<input type="text"/>	
	BellSouth Sub-entity	<input type="text"/>	
	Type	<input type="text" value="N/A"/>	
	<u>Events</u>		
	<u>Date</u>	<u>Comments</u>	<u>Attached Files</u>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<div><input type="button" value="Add Event"/> <input type="button" value="Remove Event"/></div>		
	<u>Contacts</u>		

FIG. 158



09750130 061801

<u><b>Contacts</b></u>			
<u>Name</u>	<u>Title</u>	<u>Country</u>	
<u>Address1</u>	<u>Address2</u>	<u>City</u>	
<u>State</u>	<u>Zip</u>	<u>Phone</u>	
<u><b>Individual Contact Events</b></u>			
<u>Date</u>	<u>Comments</u>	<u>Attached Files</u>	
<input type="button" value="Add Event"/> <input type="button" value="Remove Event"/>			
<input type="button" value="Search"/> <input type="button" value="Cancel"/>			

FIG. 159

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP](#)   [Product](#)   [Marketing Contracts/Agreements](#)   [Searching/Reporting Contacts](#)  
[Inventory](#)   [Inventory](#)

<u>Search for Contacts</u>					
<a href="#">Create Contacts</a> <a href="#">View/Edit</a> <a href="#">Contacts</a>	<u>Company Name</u>	<u>BellSouth Sub-entity</u>	<u>Type</u>	<u>Phone</u>	
	<u>Data</u>	<u>Data</u>	<u>Data</u>	<u>Title</u>	<u>Data</u>
		<u>Name</u>			
		<u>Data</u>			

FIG. 160

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP](#)   [Product](#)   [Marketing Contracts/Agreements](#)   [Searching/Reporting](#)   [Contacts](#)  
[Inventory](#)   [Inventory](#)

## View/Edit Individual Contact

[Create Contacts](#)

[View/Edit](#)  
[Contacts](#)

Name Carter Pate   Title Associate   Country USA  
Address1 123 Smith   Address2   City New York  
Ave.  
State NJ   Zip 07000   Phone 201-596-8000

### Individual Contact Events

Date	Comments	Attached Files
2/20/2000	Meeting with Tom	presentation.doc

[Edit](#)

FIG. 161

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP](#)
[Product](#)
[Marketing Contracts/Agreements](#)
[Searching/Reporting](#)
[Contacts](#)

[Inventory](#)
[Inventory](#)

## Add/Edit Individual Contact

[Create Contacts](#)

[View/Edit](#)  
[Contacts](#)

Name	Title	Country
Address1	Address2	City
State	Zip	Phone

## Individual Contact Events

Date	Comments	Attached Files

[Add Event](#)
[Remove Event](#)

[Submit](#)
[Cancel](#)

FIG. 162

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP](#)
[Product](#)
[Marketing Contracts/Agreements](#)
[Searching/Reporting](#)
[Contacts](#)

[Inventory](#)
[Inventory](#)

## View Contact

Create Contacts

[View/Edit](#)  
[Contacts](#)

Company Name Company Name

BellSouth Sub-entity Entity

Type IP Group

Events

Attached Files

Comments

Date

Contacts

[Name](#)
[Title](#)
[Address1](#)
[Address2](#)
[City](#)
[State](#)
[Country](#)
[Zip](#)
[Phone](#)
[Comments](#)

Edit

FIG. 163

# INTELLECTUAL PROPERTY MANAGEMENT SYSTEM

[IP](#)
[Product](#)
[Marketing Contracts/Agreements](#)
[Searching/Reporting](#)
[Contacts](#)

[Inventory](#)
[Inventory](#)

## Add/Edit Contact

Create Contacts

View/Edit Contacts

Company Name

BellSouth Sub-entity

Type

Events

Date	Comments	Attached Files

Add Event

Remove Event

Contacts

FIG. 164

FOBT30" OCT05'60

<u>Contacts</u>									
<u>Name</u>	<u>Title</u>	<u>Address1</u>	<u>Address2</u>	<u>City</u>	<u>State</u>	<u>Country</u>	<u>Zip</u>	<u>Phone</u>	<u>Comments</u>
<div><div>Add Contact</div><div>Remove Contact</div></div>									
<div><div>Submit</div><div>Cancel</div></div>									

Document #: 1033792 v.6

FIG. 165

09750130-061801

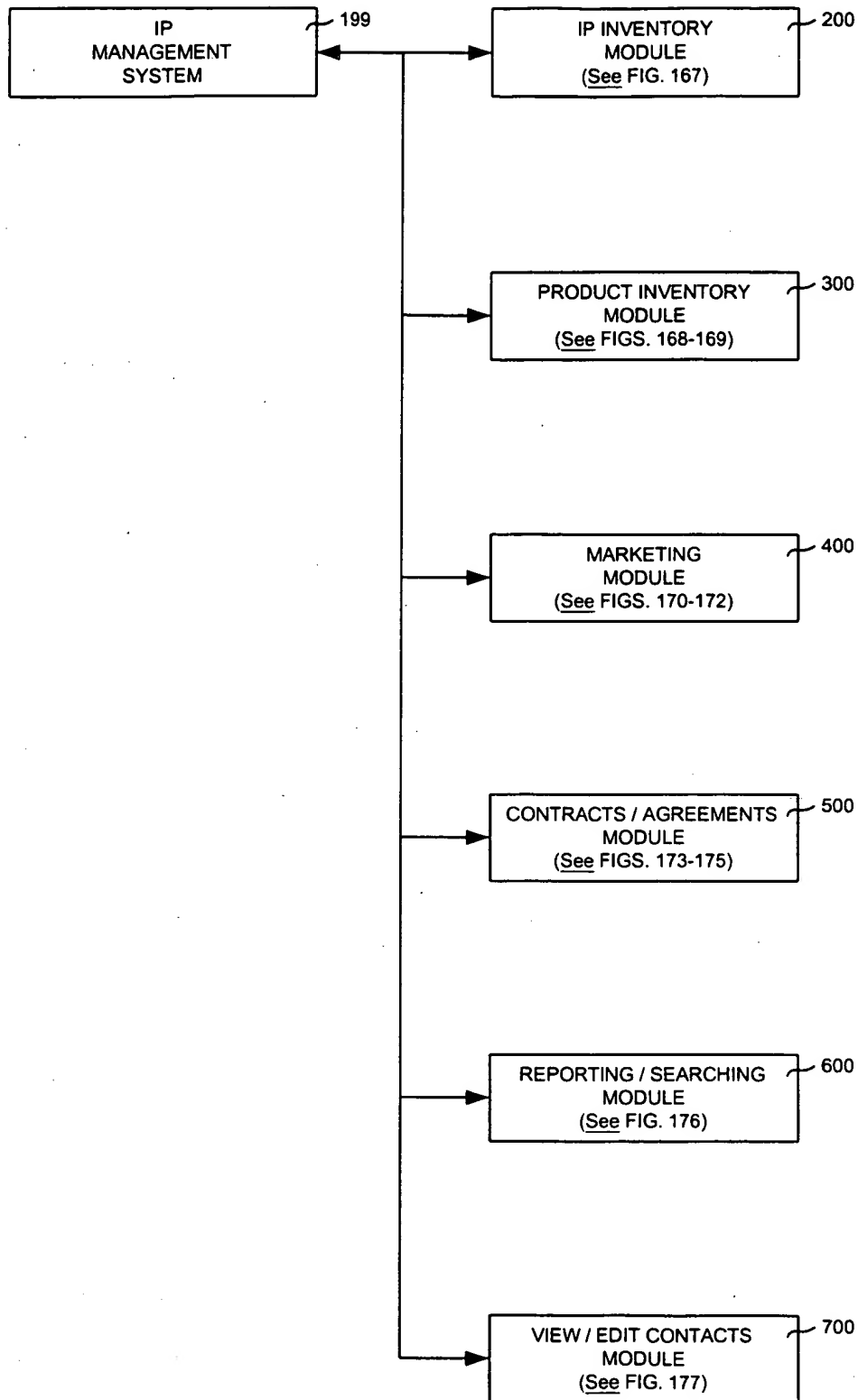


FIG. 166



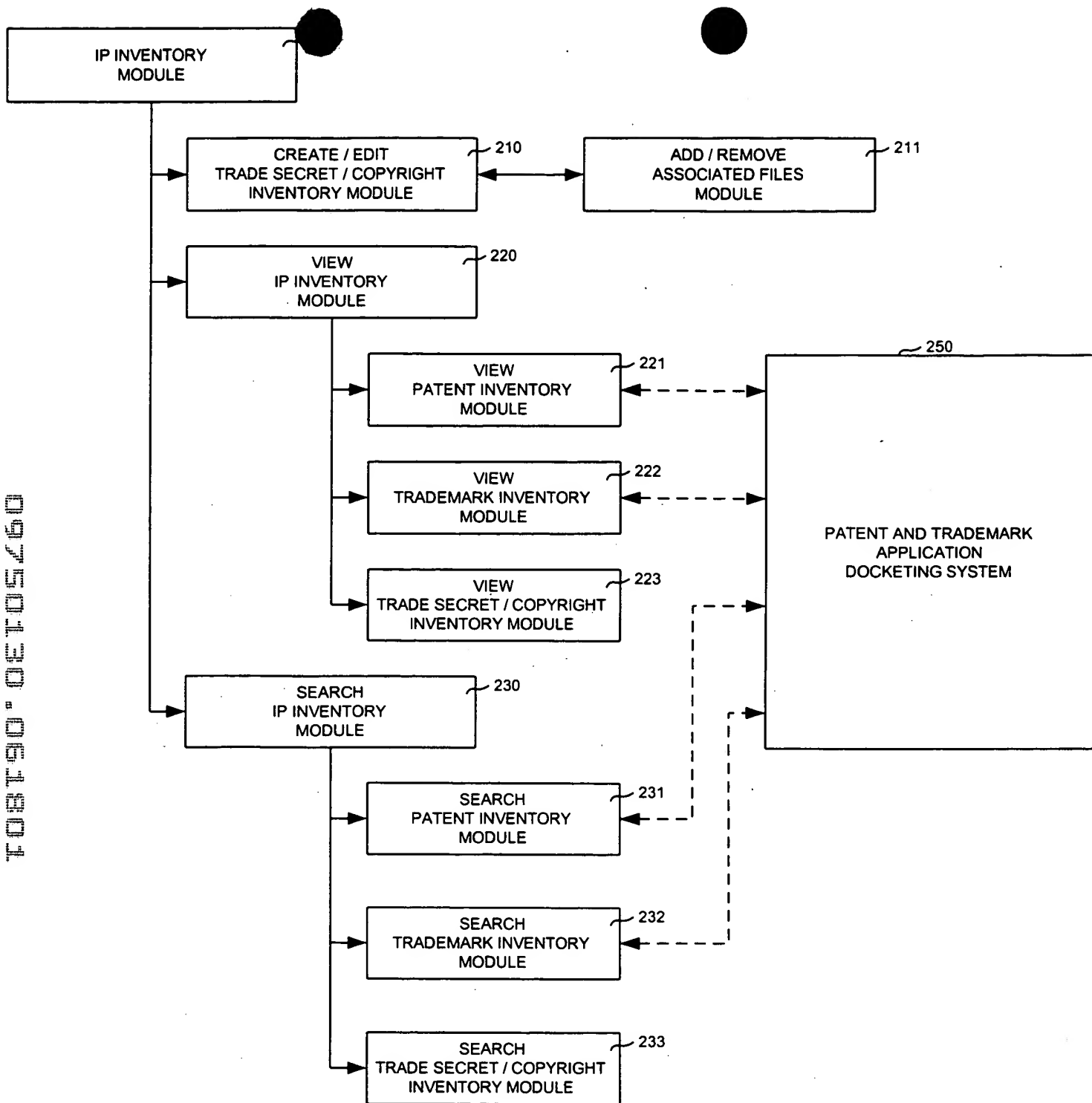


FIG. 167

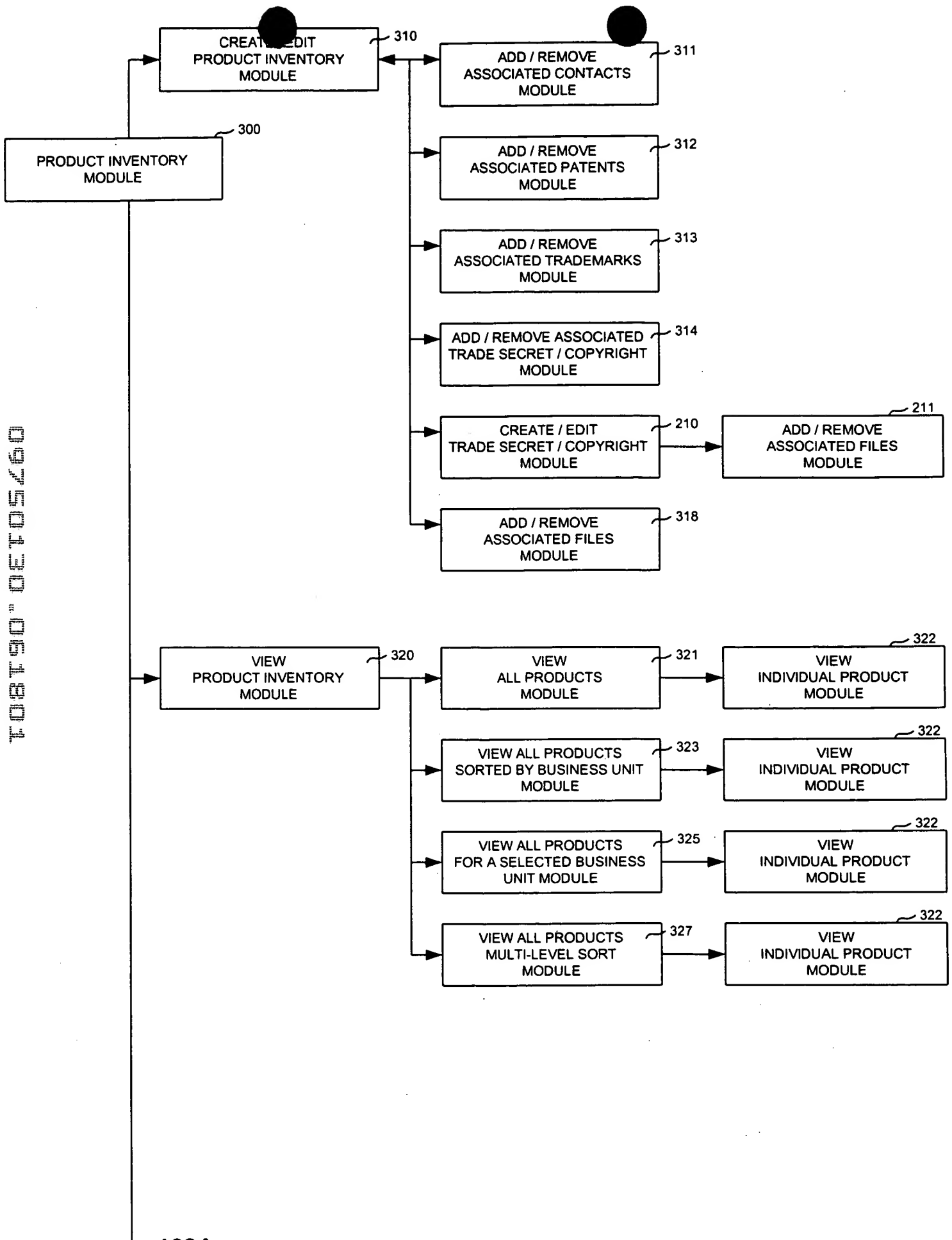
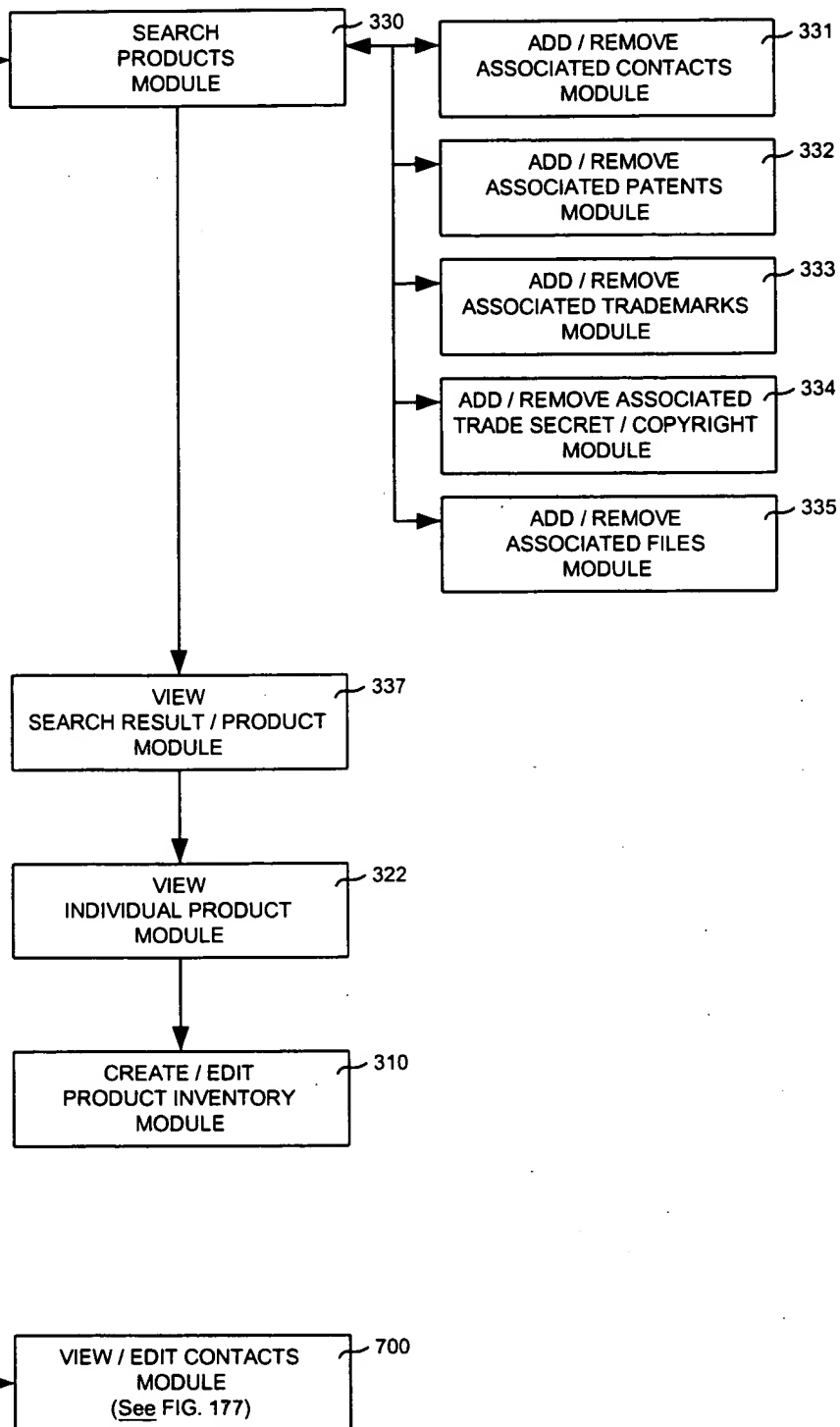


FIG. 168

□ 168A



168A



09750130-061801

FIG. 169

09750130.061801

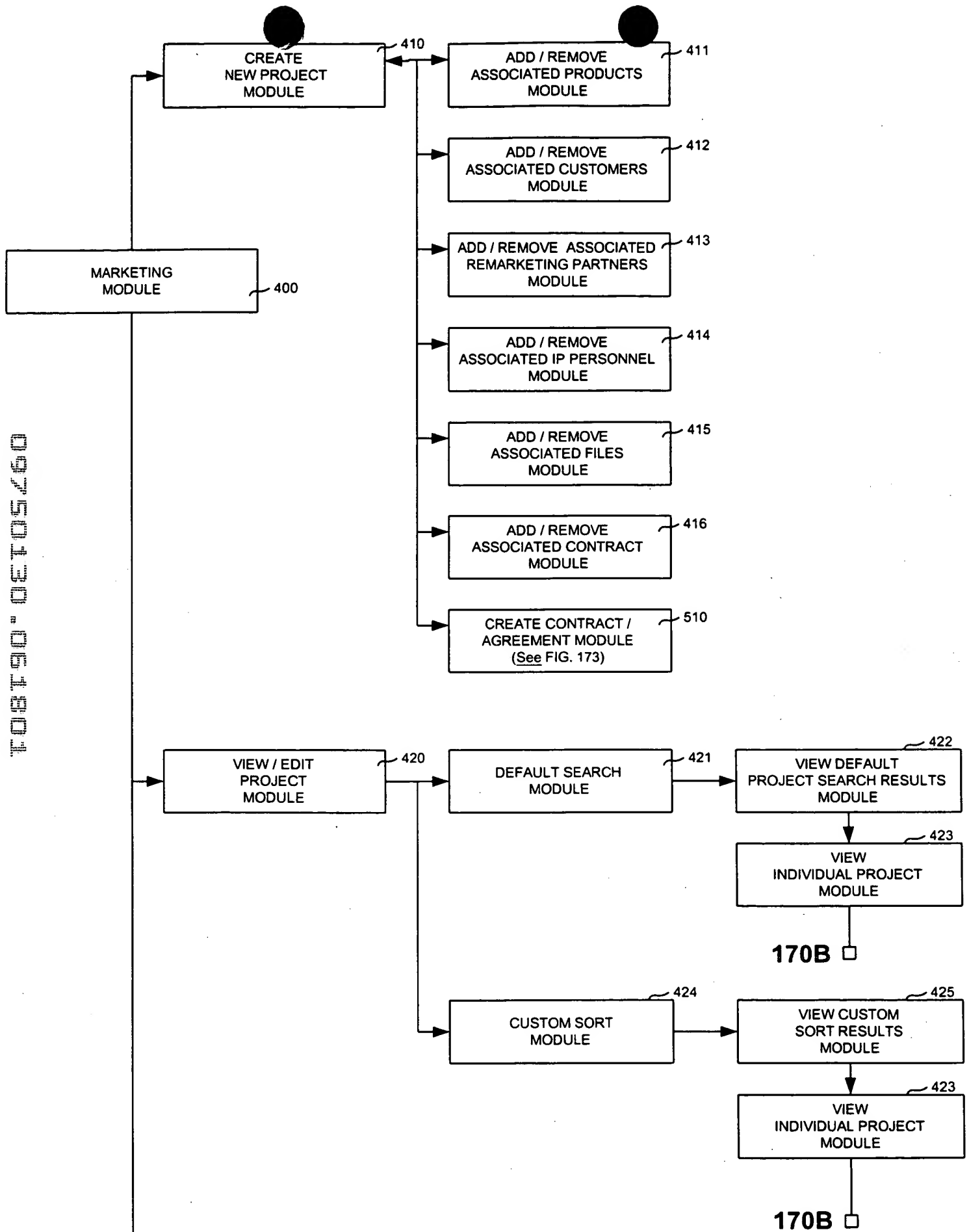


FIG. 170 170A

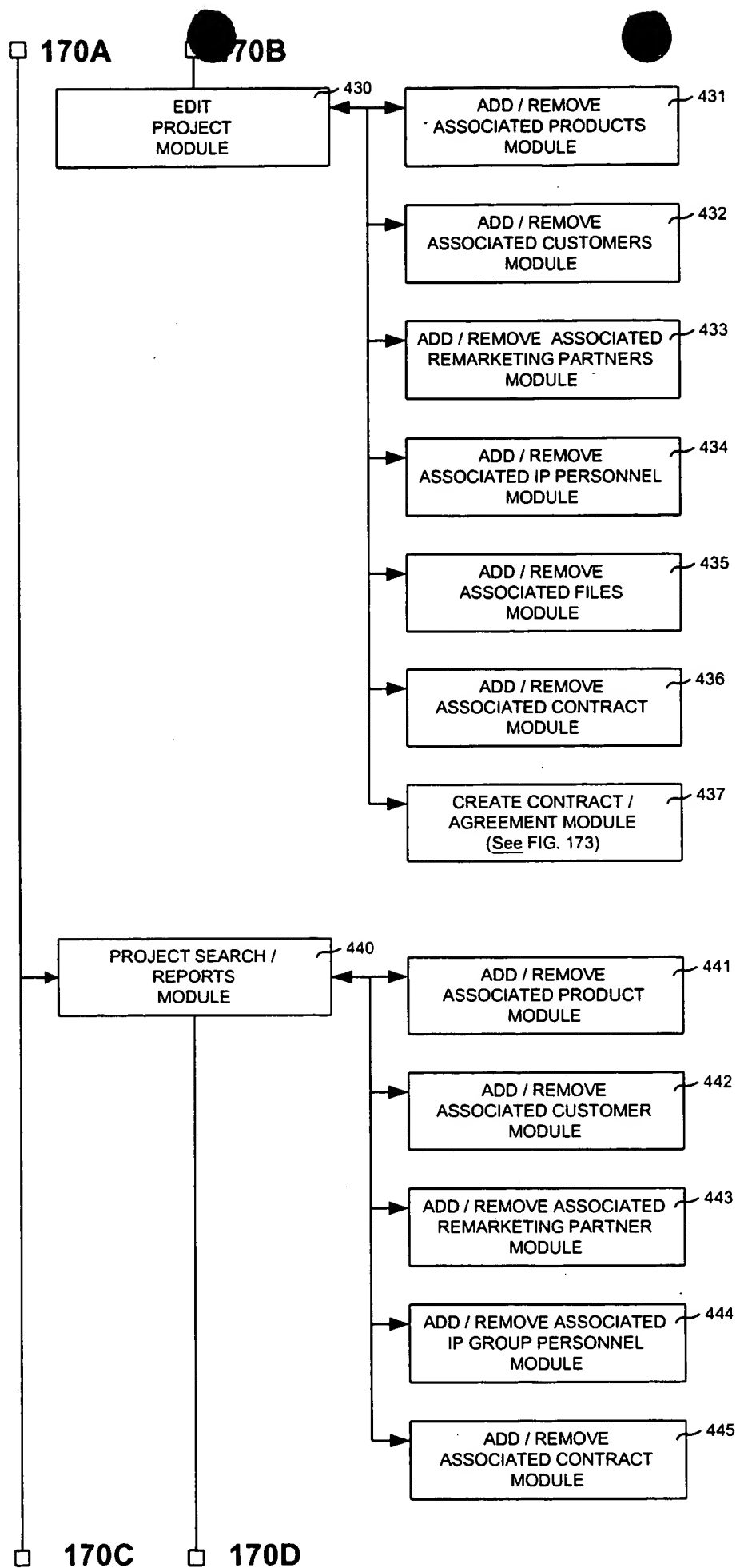


FIG. 171

108150-061801

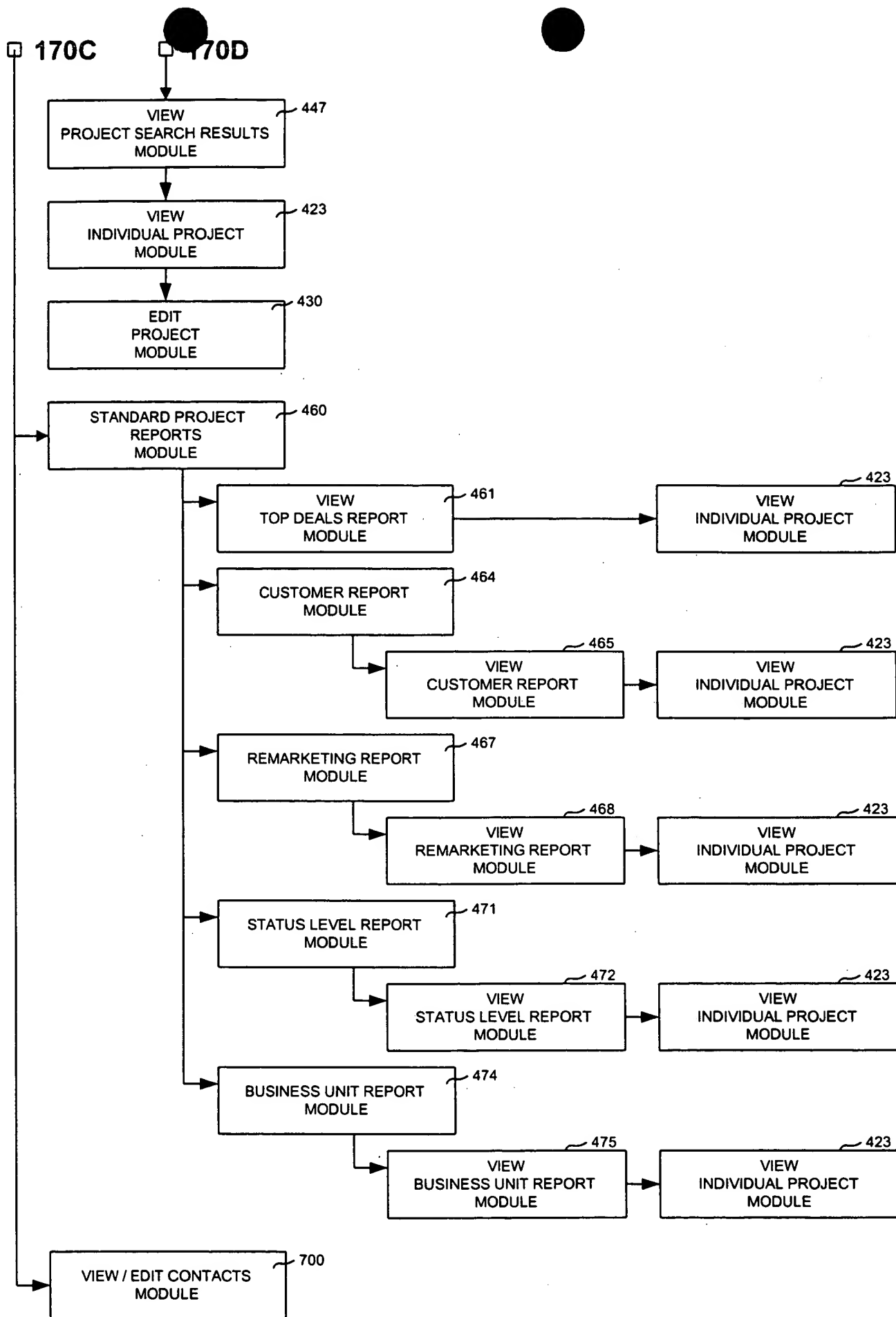
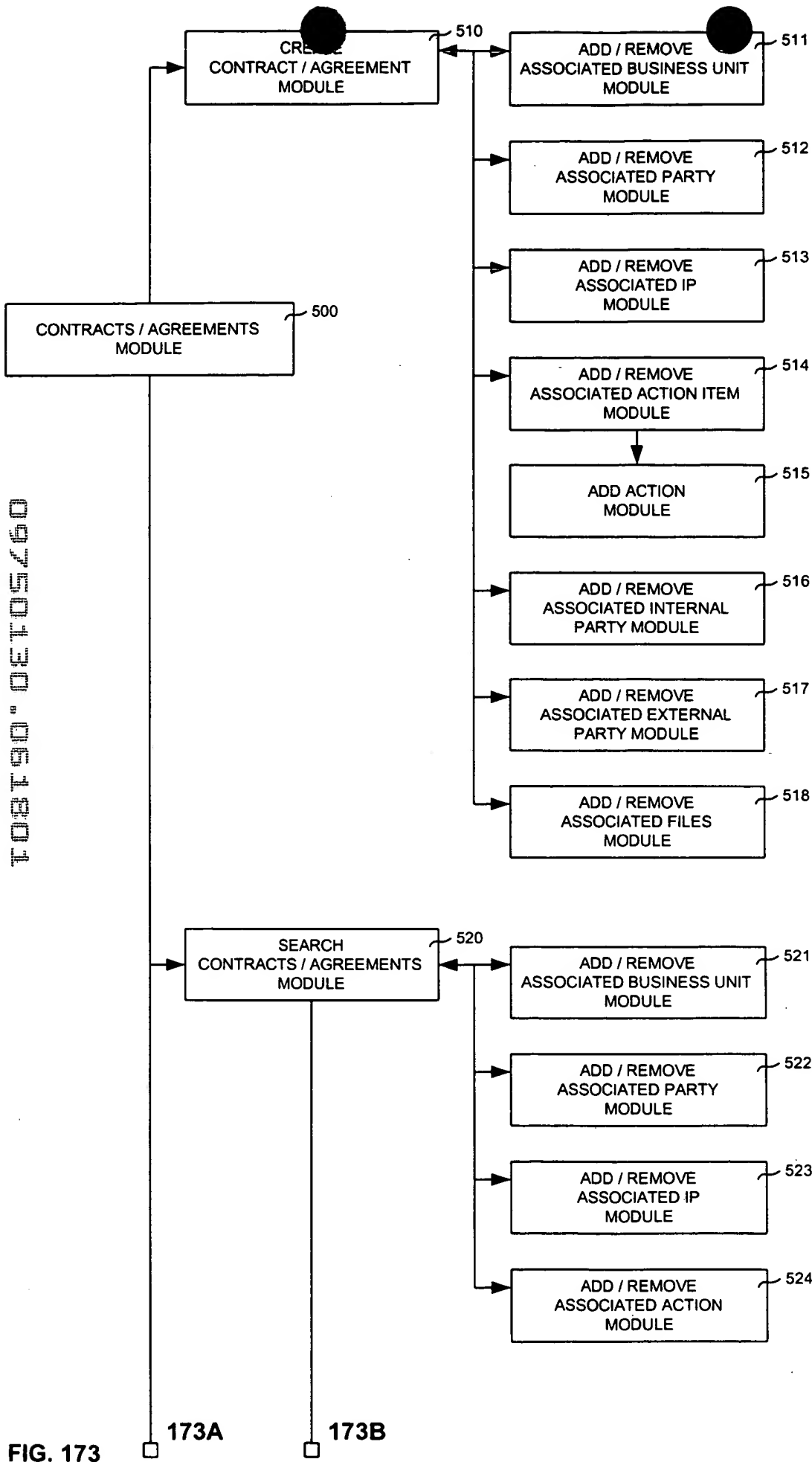


FIG. 172

09750130.061801



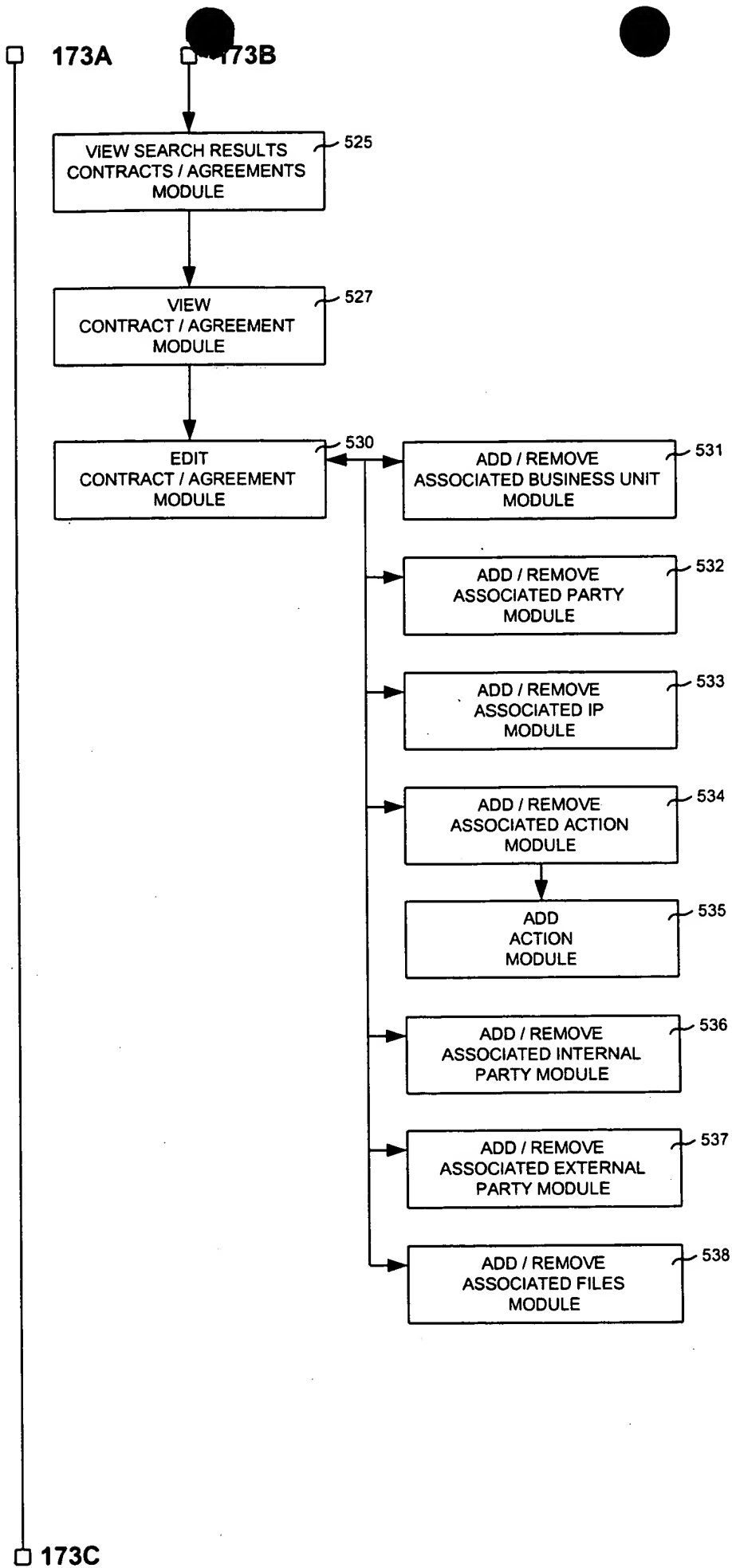


FIG. 174

173C



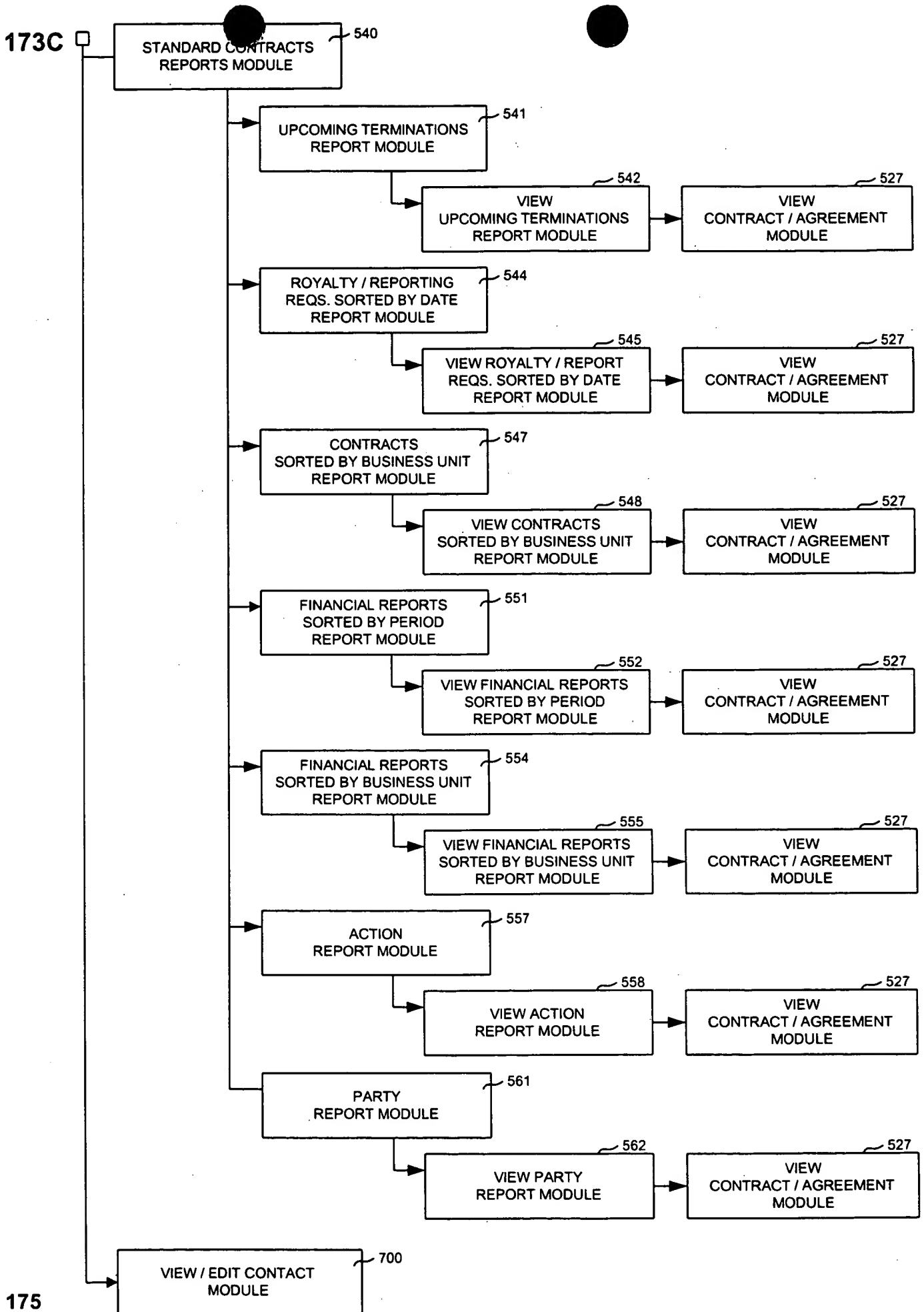


FIG. 175

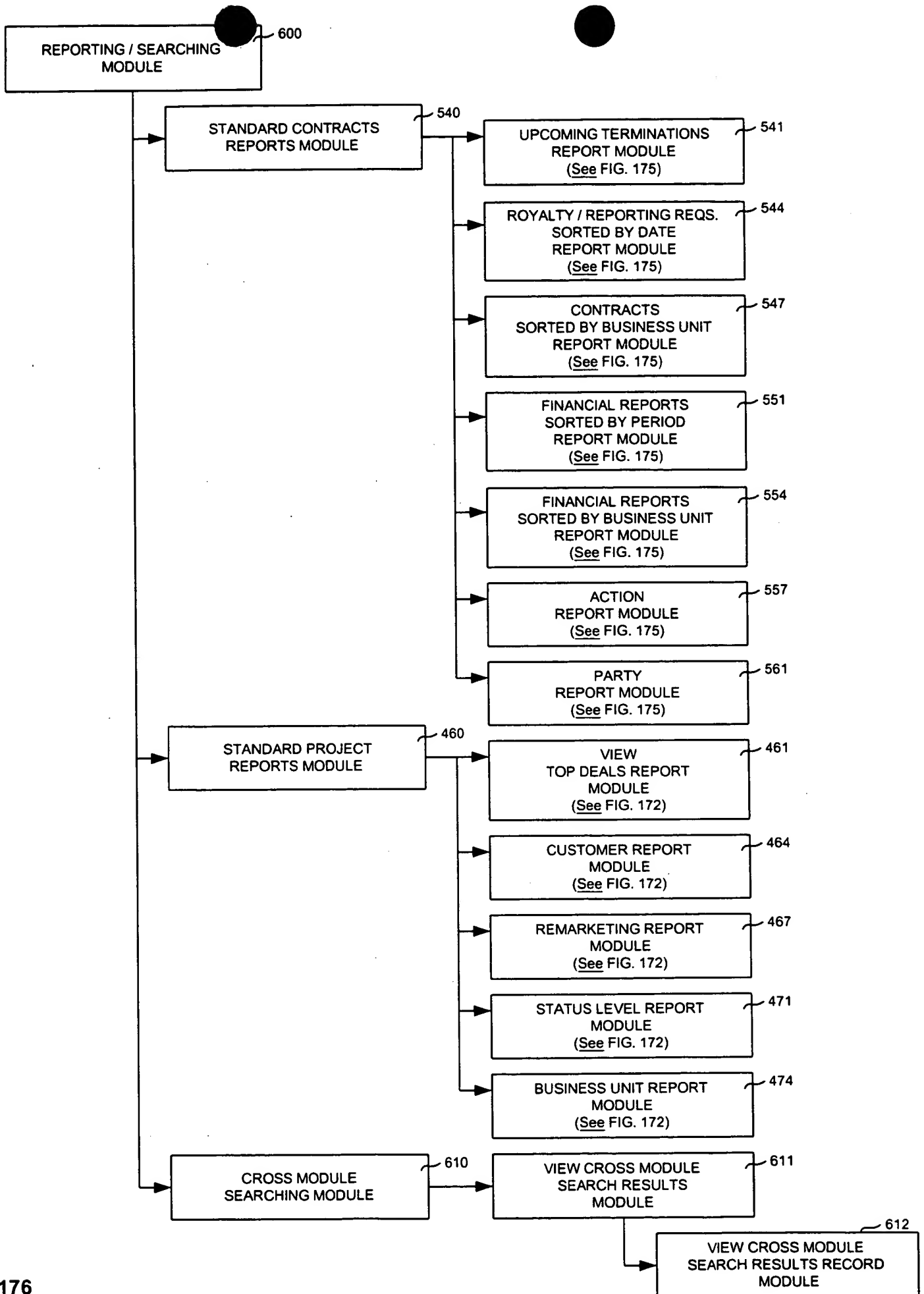


FIG. 176

09750130-061801

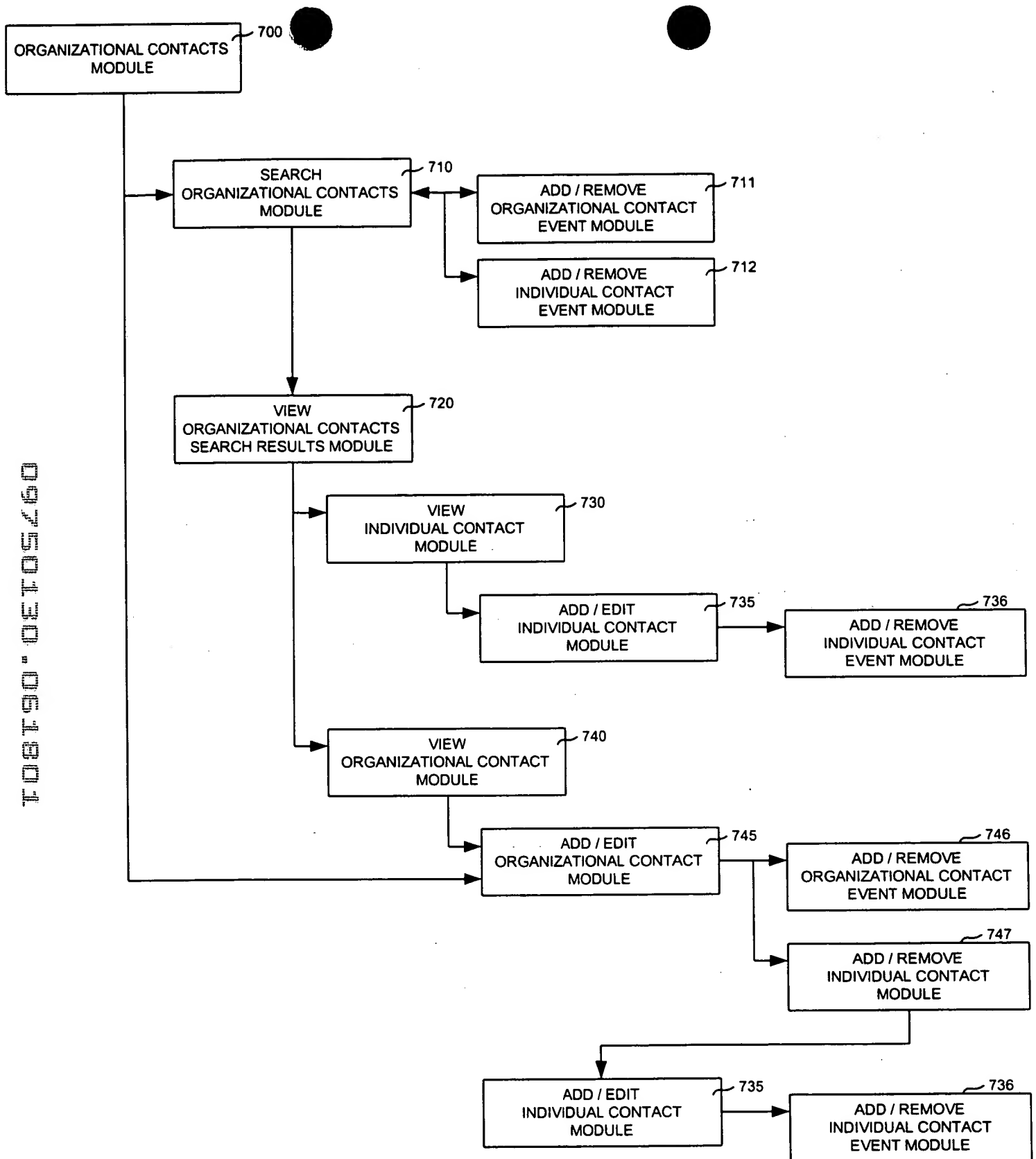


FIG. 177

09750130.061801  
TOST90" DET05260

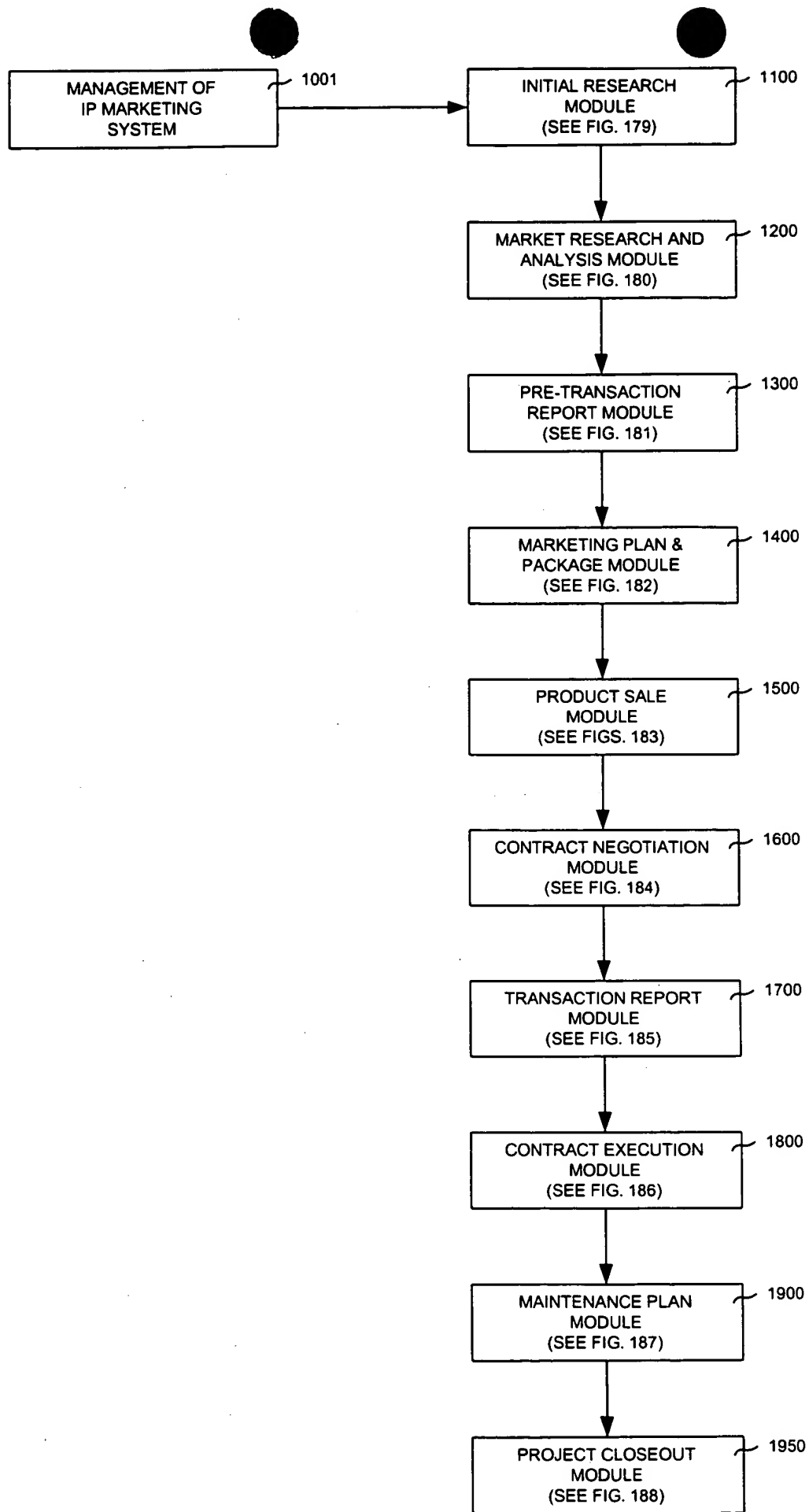


FIG. 178

09750130.06T08190

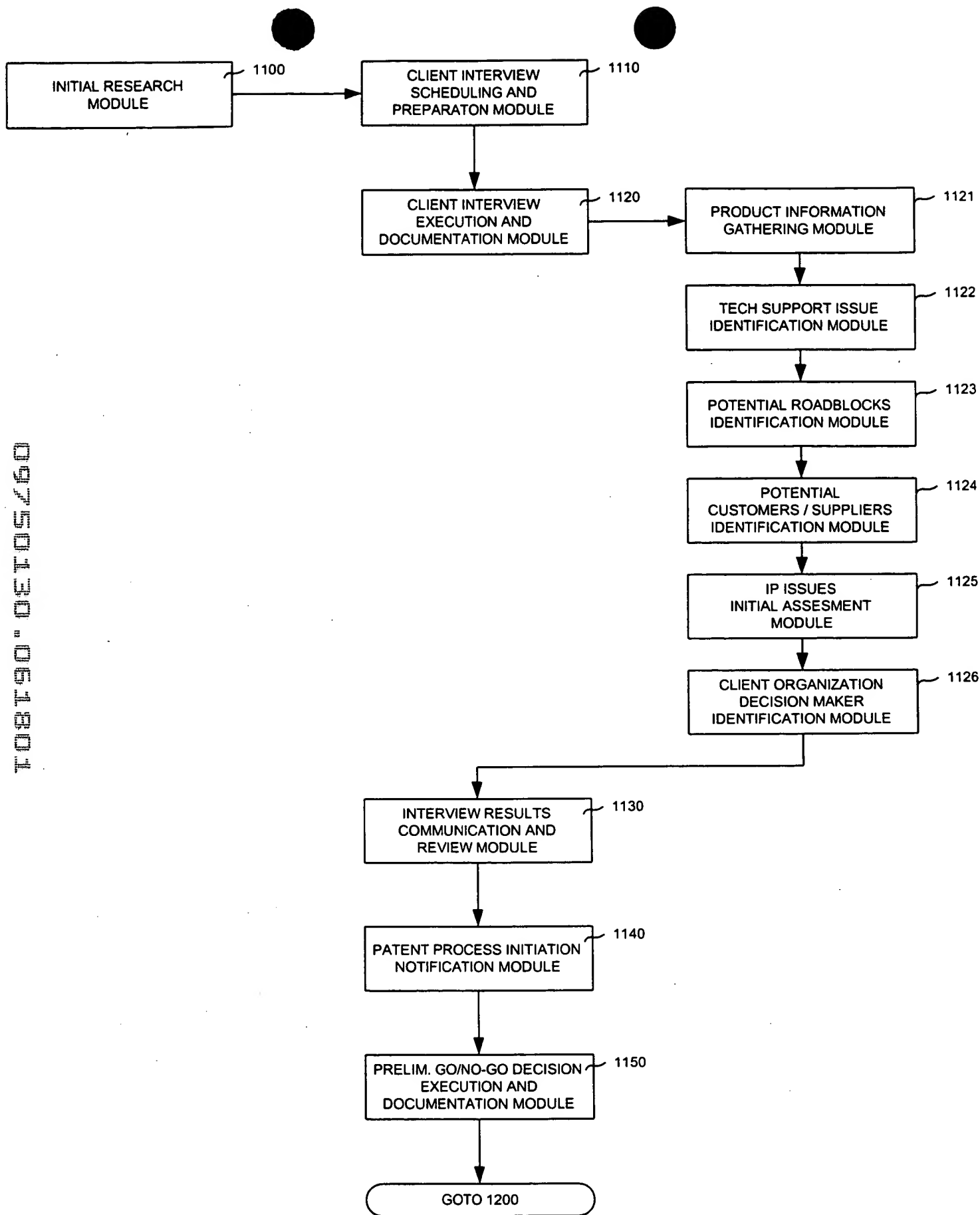


FIG. 179

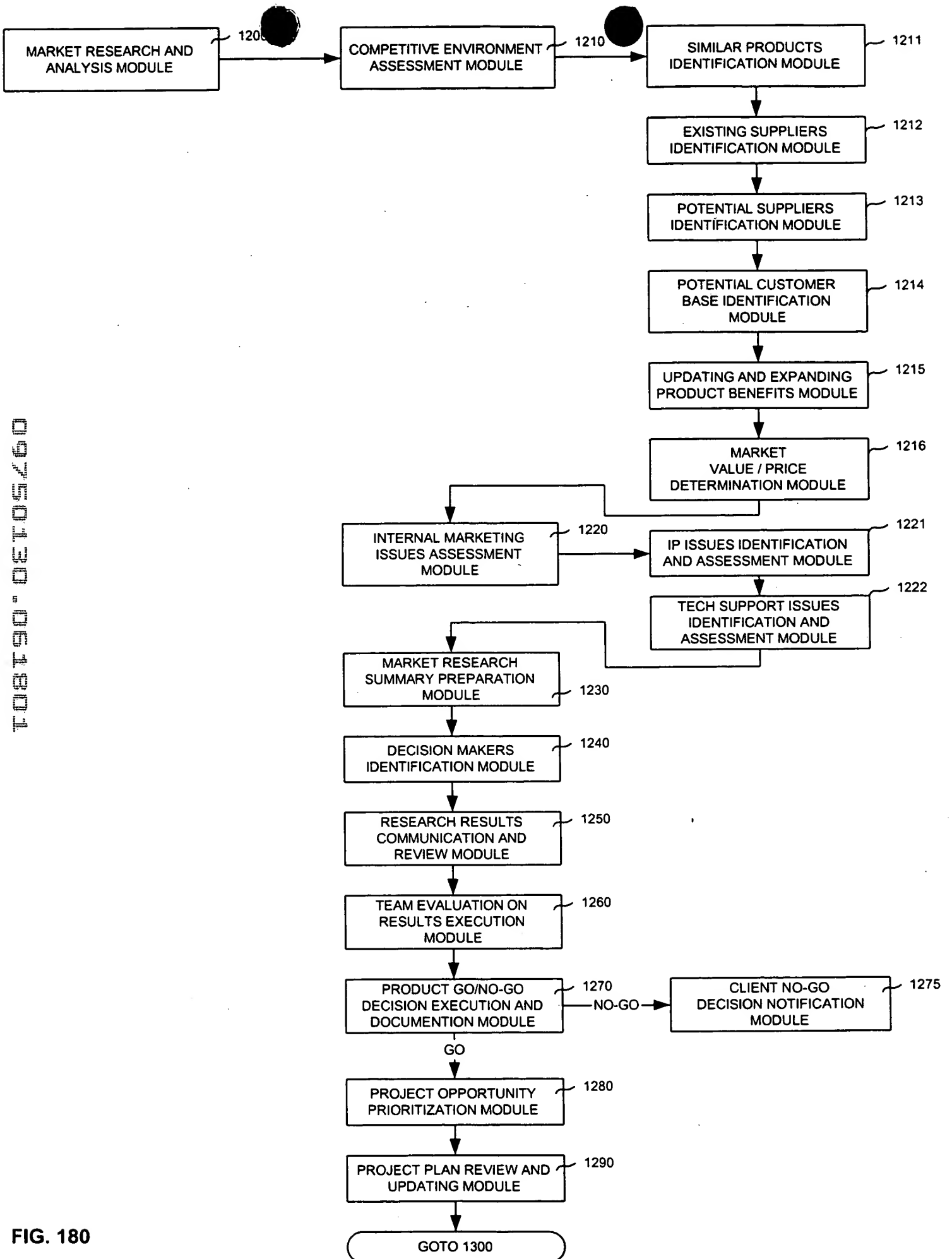


FIG. 180

09750130-061801  
T0BT90-0ET05Z60

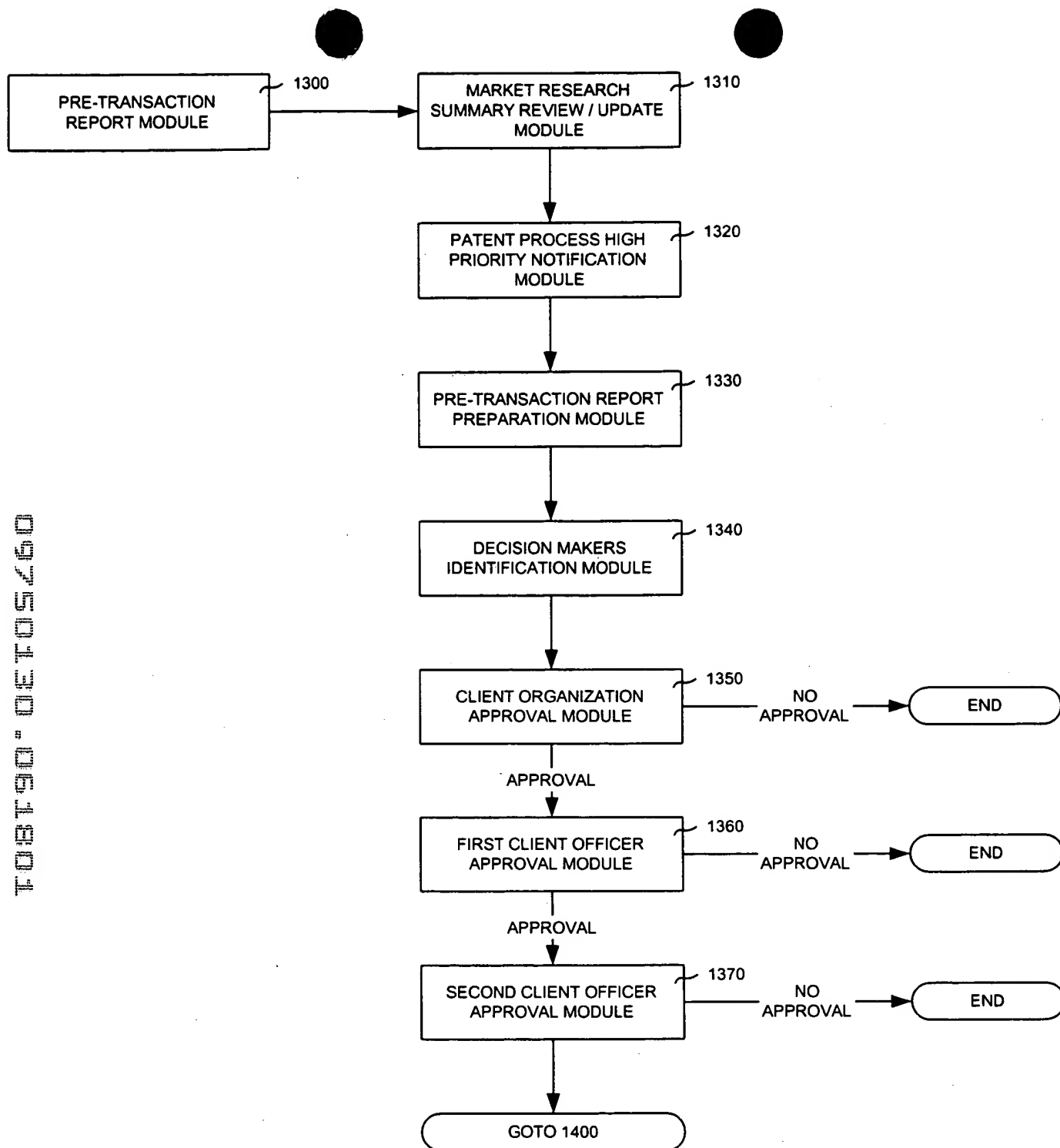


FIG. 181

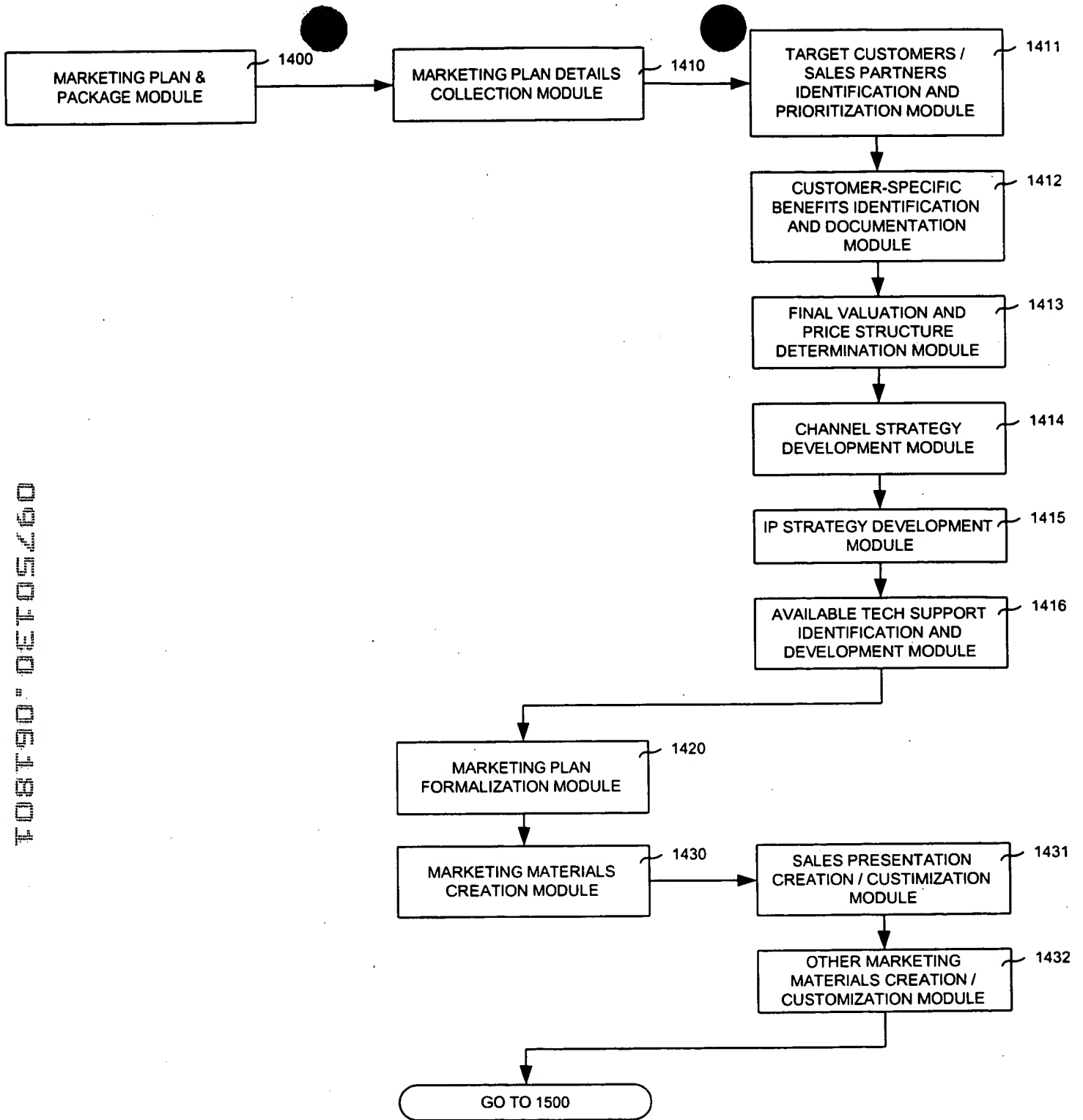
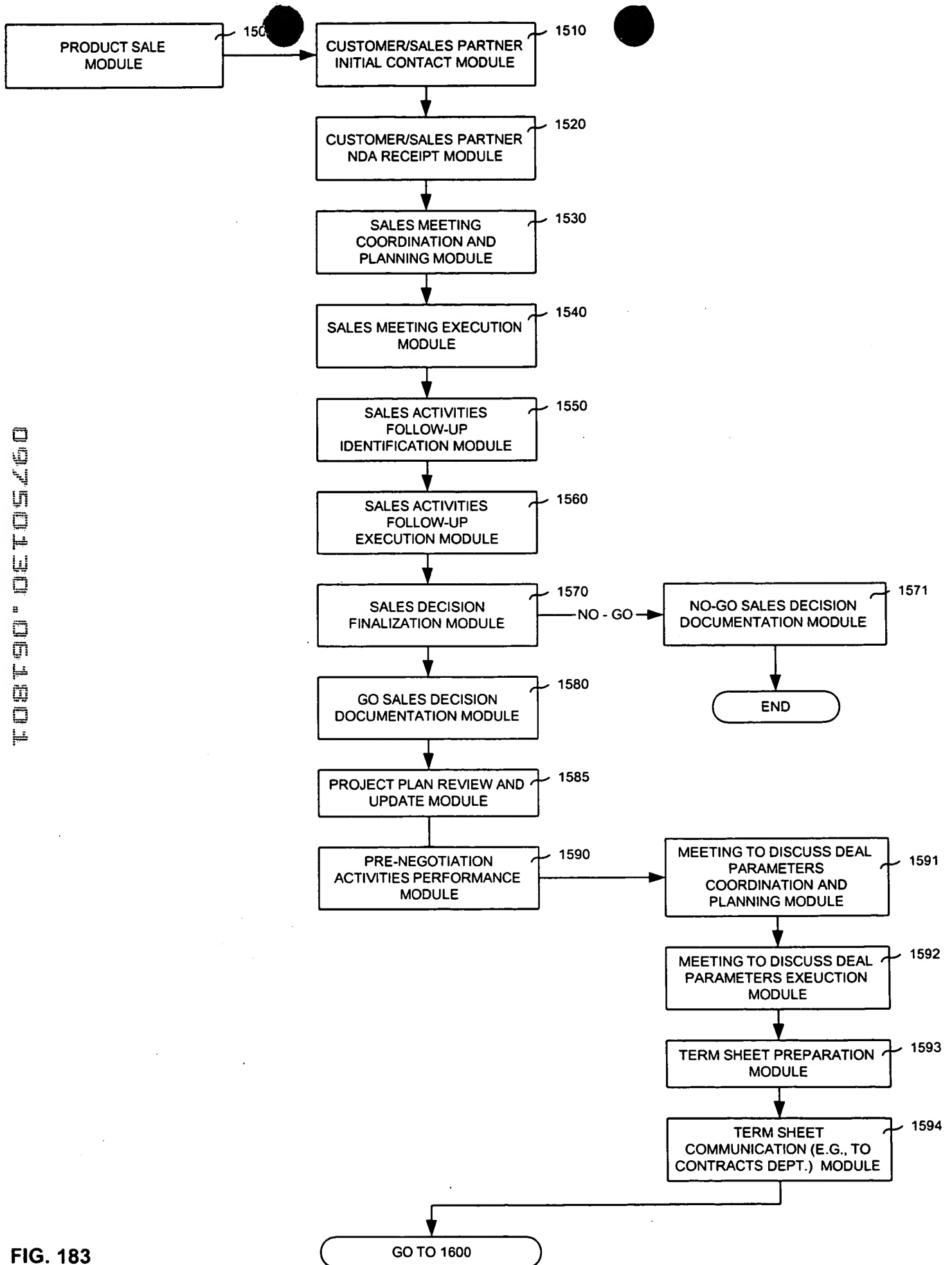
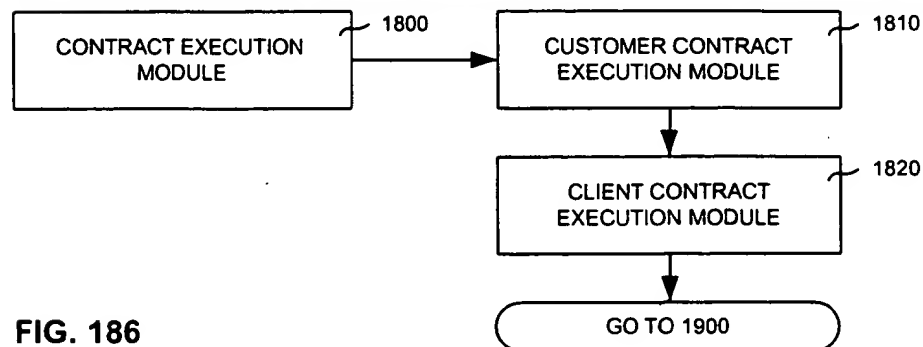
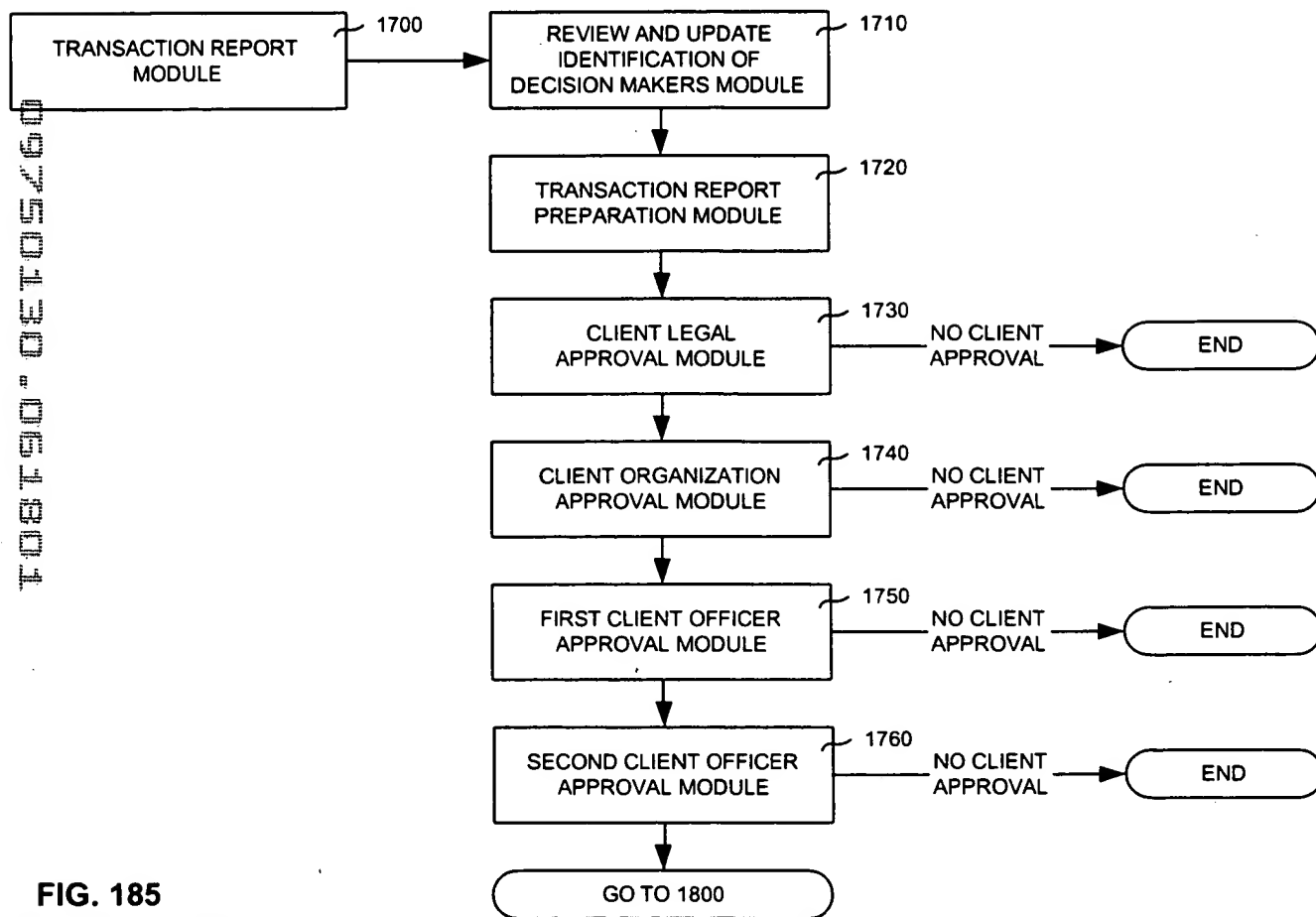
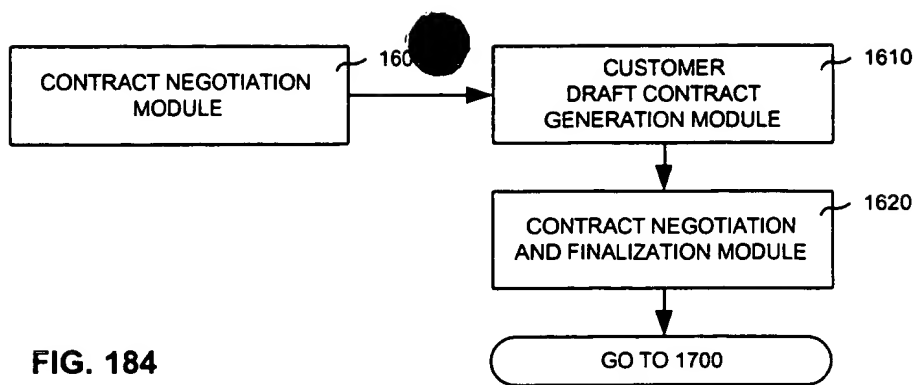
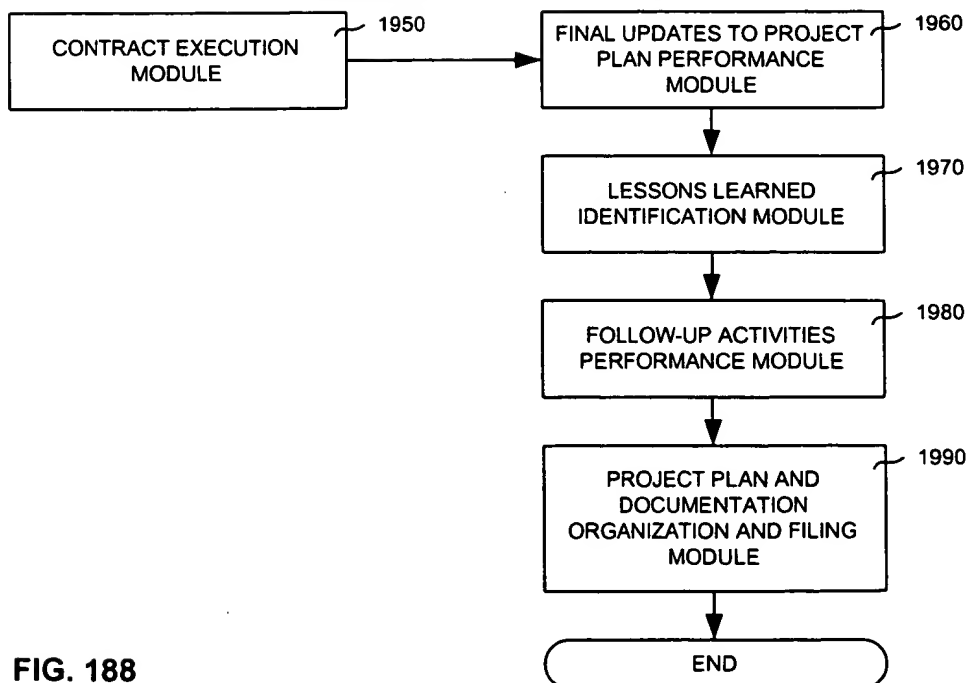
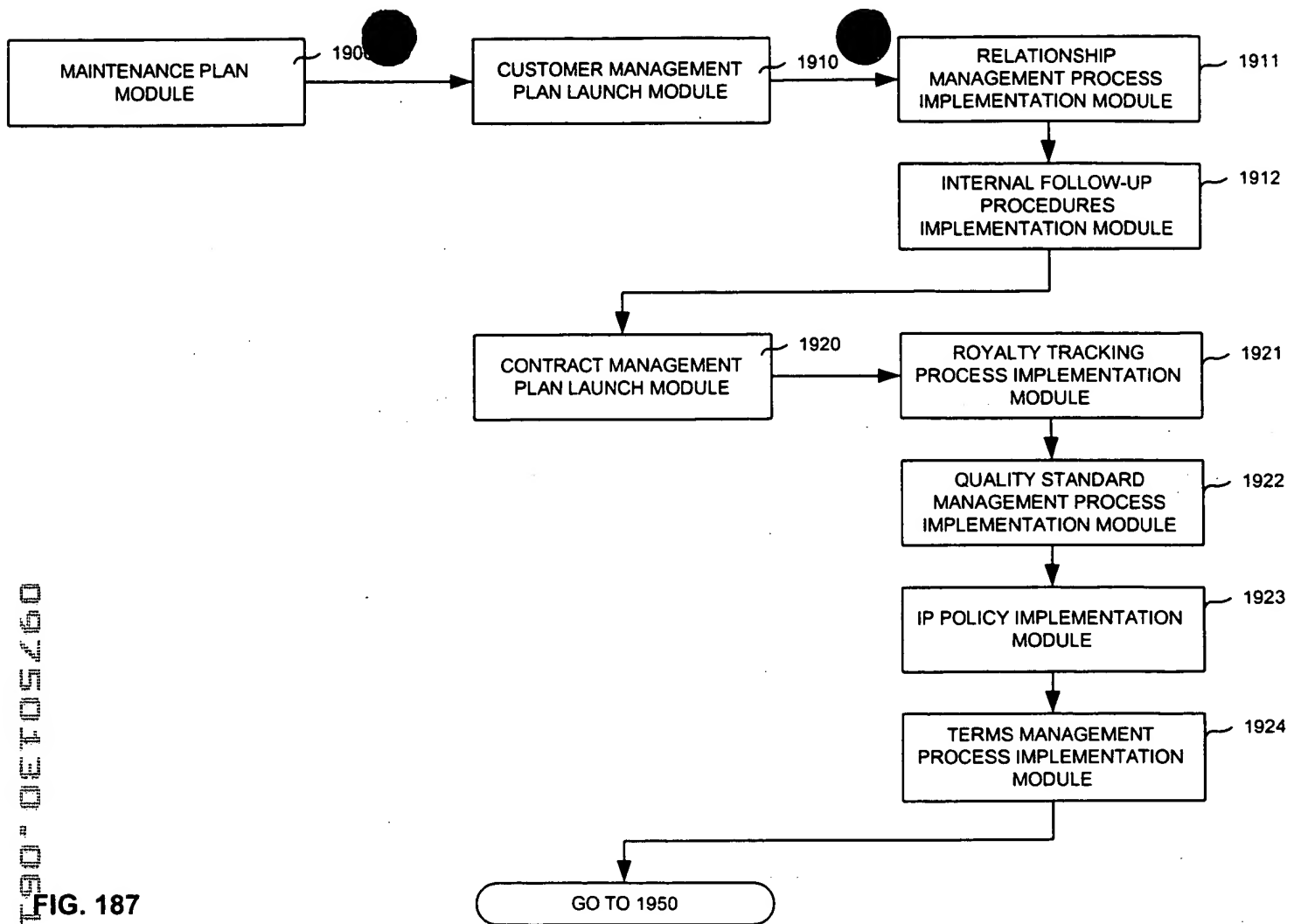


FIG. 182









# Project Template Project Plan

ID	WBS	Task Name	Duration	Start	Finish	Pred	Succ	% Comp	Del	Resources
1	1	Conduct initial research	5 days	Mon 1/3/00	Fri 1/7/00			0%	No	Product Mgr
13	2	Conduct market research and analysis	10 days	Mon 1/10/00	Fri 1/21/00			0%	No	Mktg Analyst
31	3	Complete and approve pre-transaction report (PTR)	15 days	Mon 1/24/00	Fri 2/11/00			0%	No	Product Mgr
39	4	Develop marketing plan & package	15 days	Mon 1/24/00	Fri 2/11/00			0%	No	Mktg/Sales Rep
51	5	Sell product	50 days	Mon 2/14/00	Fri 4/21/00			0%	No	Mktg/Sales Rep
68	6	Negotiate contract	50 days	Mon 4/24/00	Fri 6/30/00			0%	No	Contract Mgr
69	7	Complete & approve transaction report (TR)	15 days	Mon 7/3/00	Fri 7/21/00			0%	No	Contract Mgr
76	8	Execute contract	10 days	Mon 7/24/00	Fri 8/4/00			0%	No	Contract Mgr
79	9	Set up maintenance plan	5 days	Mon 8/7/00	Fri 8/11/00		89	0%	No	Mktg/Sales Rep
88	10	Close out project	5 days	Mon 8/14/00	Fri 8/18/00			0%	Yes	Project Lead

FIG. 189

51 Sell product

At this point, duplicate project plan for each target customer for the specified product.

88 Close out project

Project may potentially end any one of several points within project plan. Must complete close out tasks at where ever project end falls within project plan.

FIG. 190

# Project Template Project Plan

ID	WBS	Task Name	Duration	Start	Finish	Pred	Succ	% Comp	Deliv	Resources
1	1	Conduct initial research	5 days	Mon 1/3/00	Fri 1/7/00			0%	No	Product Mgr
2	1.1	Schedule & prepare for client interview	1 day	Mon 1/3/00	Mon 1/3/00		3	0%	No	Product Mgr
3	1.2	Conduct & document client interview	1 day	Tue 1/4/00	Tue 1/4/00	2	10,11	0%	No	Product Mgr
4	1.2.1	Gather product information	1 day	Tue 1/4/00	Tue 1/4/00			0%	No	Product Mgr
5	1.2.2	ID tech support issues	1 day	Tue 1/4/00	Tue 1/4/00			0%	No	Product Mgr
6	1.2.3	ID potential roadblocks	1 day	Tue 1/4/00	Tue 1/4/00			0%	No	Product Mgr
7	1.2.4	ID potential customers/suppliers	1 day	Tue 1/4/00	Tue 1/4/00			0%	No	Product Mgr
8	1.2.5	Perform initial assessment of IP issues	1 day	Tue 1/4/00	Tue 1/4/00			0%	No	Product Mgr
9	1.2.6	ID client organization decision makers	1 day	Tue 1/4/00	Tue 1/4/00			0%	No	Product Mgr
10	1.3	Communicate and review interview results	2 days	Wed 1/5/00	Thu 1/6/00	3	12	0%	No	Product Mgr
11	1.4	Notify <i>IPMAN</i> to begin patent process	1 day	Wed 1/5/00	Wed 1/5/00	3		0%	Yes	Product Mgr
12	1.5	Make & document prelim go/no-go decision	1 day	Fri 1/7/00	Fri 1/7/00	10	25,14,21	0%	Yes	Product Mgr
13	2	Conduct market research and analysis	10 days	Mon 1/10/00	Fri 1/21/00			0%	No	Mktg Analyst
14	2.1	Assess competitive environment	4 days	Mon 1/10/00	Thu 1/13/00	12	24	0%	No	Mktg Analyst
15	2.1.1	ID similar products	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	Mktg Analyst
16	2.1.2	ID existing suppliers	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	Mktg Analyst
17	2.1.3	ID potential suppliers	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	Mktg Analyst
18	2.1.4	ID potential customer base	4 days	Mon 1/10/00	Thu 1/13/00		41	0%	No	Mktg Analyst
19	2.1.5	Update & expand product benefits	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	Mktg Analyst
20	2.1.6	Determine market value/price	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	Mktg Analyst
21	2.2	Assess internal marketing issues	4 days	Mon 1/10/00	Thu 1/13/00	12	24	0%	No	Product Mgr
22	2.2.1	ID & assess IP issues	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	Product Mgr
23	2.2.2	ID & assess tech support issues	4 days	Mon 1/10/00	Thu 1/13/00			0%	No	Product Mgr

Project Template Project Plan										
ID	WBS	Task Name	Duration	Start	Finish	Pred	Succ	% Comp	Del	Resources
24	2.3	Prepare market research summary	1 day	Fri 1/14/00	Fri 1/14/00	14,21	26	0%	Yes	Mktg Analyst
25	2.4	ID decision makers	1 day	Mon 1/10/00	Mon 1/10/00	12	26	0%	Yes	Product Mgr
26	2.5	Communicate and review research results	2 days	Mon 1/17/00	Tue 1/18/00	24,25	27	0%	No	Mktg Analyst
27	2.6	Conduct team evaluation on results	1 day	Wed 1/19/00	Wed 1/19/00	26	28	0%	No	Product Mgr
28	2.7	Make & document product go/no go decision	1 day	Thu 1/20/00	Thu 1/20/00	27	29,30	0%	Yes	Product Mgr
29	2.8	Prioritize project opportunity or notify client of no go decision	1 day	Fri 1/21/00	Fri 1/21/00	28	41,34,35,32,33,4	0%	Yes	Product Mgr
30	2.9	Review & update project plan	1 day	Fri 1/21/00	Fri 1/21/00	28		0%	Yes	Product Mgr
31	3	Complete and approve pre-transaction report (PTR)	15 days	Mon 1/24/00	Fri 2/11/00			0%	No	Product Mgr
32	3.1	Review/update market research summary	1 day	Mon 1/24/00	Mon 1/24/00	29		0%	Yes	Mktg Analyst
33	3.2	Notify <i>IP/PA</i> of potential sale/move patent process into high priority	1 day	Mon 1/24/00	Mon 1/24/00	29		0%	No	Product Mgr
34	3.3	Prepare PTR	5 days	Mon 1/24/00	Fri 1/28/00	29	36	0%	Yes	Product Mgr
35	3.4	ID decision makers	1 day	Mon 1/24/00	Mon 1/24/00	29		0%	Yes	Product Mgr
36	3.5	Gain client organization approval	4 days	Mon 1/31/00	Thu 2/3/00	34	37	0%	Yes	Product Mgr
37	3.6	Gain VP Corporate Development approval	3 days	Fri 2/4/00	Tue 2/8/00	36	38	0%	Yes	Product Mgr
38	3.7	Gain VP CIO approval	3 days	Wed 2/9/00	Fri 2/11/00	37	52	0%	Yes	Product Mgr
39	4	Develop marketing plan & package	15 days	Mon 1/24/00	Fri 2/11/00			0%	No	Mktg/Sales Rep
40	4.1	Gather marketing plan details	5 days	Mon 1/24/00	Fri 1/28/00	29	47	0%	No	Mktg/Sales Rep
41	4.1.1	ID & prioritize target customer(s)/sales partners	5 days	Mon 1/24/00	Fri 1/28/00	18,29		0%	Yes	Mktg/Sales Rep
42	4.1.2	ID & document customer-specific benefits	5 days	Mon 1/24/00	Fri 1/28/00			0%	Yes	Mktg/Sales Rep
43	4.1.3	Determine final valuation & price structure	5 days	Mon 1/24/00	Fri 1/28/00			0%	Yes	Mktg Analyst
44	4.1.4	Develop channel strategy	5 days	Mon 1/24/00	Fri 1/28/00			0%	Yes	Mktg/Sales Rep
45	4.1.5	Develop IP strategy	5 days	Mon 1/24/00	Fri 1/28/00			0%	No	Mktg/Sales Rep
46	4.1.6	ID & develop available tech support	5 days	Mon 1/24/00	Fri 1/28/00			0%	No	Mktg/Sales Rep

# Project Template Project Plan

ID	WBS	Task Name	Duration	Start	Finish	Pred	Succ	% Comp	Del	Resources
47	4.2	Formalize marketing plan	5 days	Mon 1/31/00	Fri 2/4/00	40	50.49	0%	Yes	Mktg/Sales Rep
48	4.3	Create marketing materials	5 days	Mon 2/7/00	Fri 2/11/00			0%	No	Product Mgr
49	4.3.1	Create/customize sales presentation	5 days	Mon 2/7/00	Fri 2/11/00	47		0%	Yes	Product Mgr
50	4.3.2	Create/customize other marketing materials	5 days	Mon 2/7/00	Fri 2/11/00	47		0%	Yes	Product Mgr
51	5	Sell product	50 days	Mon 2/14/00	Fri 4/21/00			0%	No	Mktg/Sales Rep
52	5.1	Make initial contact with customer(s)/sales partners	3 days	Mon 2/14/00	Wed 2/16/00	38	53	0%	Yes	Mktg/Sales Rep
53	5.2	Obtain NDA from customer/sales partner	5 days	Thu 2/17/00	Wed 2/23/00	52	54	0%	Yes	Mktg/Sales Rep
54	5.3	Coordinate & plan sales meeting	10 days	Thu 2/24/00	Wed 3/8/00	53	55	0%	Yes	Mktg/Sales Rep
55	5.4	Conduct sales meeting	1 day	Thu 3/9/00	Thu 3/9/00	54	56	0%	No	Mktg/Sales Rep
56	5.5	ID follow-up sales activities	1 day	Fri 3/10/00	Fri 3/10/00	55	57	0%	Yes	Mktg/Sales Rep
57	5.6	Perform follow-up sales activities	5 days	Mon 3/13/00	Fri 3/17/00	56	58	0%	No	Mktg/Sales Rep
58	5.7	Finalize sales decision	10 days	Mon 3/20/00	Fri 3/31/00	57	59,60,62	0%	Yes	Mktg/Sales Rep
59	5.8	Document go/no go sale decision	1 day	Mon 4/3/00	Mon 4/3/00	58		0%	Yes	Mktg/Sales Rep
60	5.9	Review & update project plan	1 day	Mon 4/3/00	Mon 4/3/00	58		0%	Yes	Mktg/Sales Rep
61	5.10	Perform pre-negotiation activities	15 days	Mon 4/3/00	Fri 4/21/00			0%	No	Mktg/Sales Rep
62	5.10.1	Coordinate & plan meeting to discuss deal parameters	10 days	Mon 4/3/00	Fri 4/14/00	58	63	0%	Yes	Mktg/Sales Rep
63	5.10.2	Conduct meeting to discuss deal parameters	1 day	Mon 4/17/00	Mon 4/17/00	62	64	0%	No	Mktg/Sales Rep
64	5.10.3	Prepare term sheet	3 days	Tue 4/18/00	Thu 4/20/00	63	65	0%	Yes	Mktg/Sales Rep
65	5.10.4	Communicate term sheet to Contracts	1 day	Fri 4/21/00	Fri 4/21/00	64	67	0%	No	Mktg/Sales Rep
66	6	Negotiate contract	50 days	Mon 4/24/00	Fri 6/30/00			0%	No	Contract Mgr
67	6.1	Generate draft contract for customer	5 days	Mon 4/24/00	Fri 4/28/00	65	68	0%	Yes	Contract Mgr
68	6.2	Negotiate and finalize contract	45 days	Mon 5/1/00	Fri 6/30/00	67	70,71	0%	Yes	Contract Mgr
69	7	Complete & approve transaction report (TR)	15 days	Mon 7/3/00	Fri 7/21/00			0%	No	Contract Mgr



Project Template Project Plan

ID	WBS	Task Name	Duration	Start	Finish	Pred	Succ	% Comp	Del	Resources
70	7.1	Review/update decision makers	1 day	Mon 7/3/00	Mon 7/3/00	68		0%	Yes	Mktg/Sales Rep
71	7.2	Prepare TR	5 days	Mon 7/3/00	Fri 7/7/00	68	72	0%	Yes	Mktg/Sales Rep
72	7.3	Obtain <i>PR/AR/K</i> legal approval	1 day	Mon 7/10/00	Mon 7/10/00	71	73	0%	Yes	Contract Mgr
73	7.4	Obtain client organization approval	3 days	Tue 7/11/00	Thu 7/13/00	72	74	0%	Yes	Contract Mgr
74	7.5	Obtain VP Corporate Development approval	3 days	Fri 7/14/00	Tue 7/18/00	73	75	0%	Yes	Contract Mgr
75	7.6	Obtain VP CIO approval	3 days	Wed 7/19/00	Fri 7/21/00	74	77	0%	Yes	Contract Mgr
76	8	Execute contract	10 days	Mon 7/24/00	Fri 8/4/00			0%	No	Contract Mgr
77	8.1	Obtain customer contract signature	8 days	Mon 7/24/00	Wed 8/2/00	75	78	0%	Yes	Contract Mgr
78	8.2	Obtain <i>PR/AR/K</i> contract signature	2 days	Thu 8/3/00	Fri 8/4/00	77	80.83	0%	Yes	Contract Mgr
79	9	Set up maintenance plan	5 days	Mon 8/7/00	Fri 8/11/00		89	0%	No	Mktg/Sales Rep
80	9.1	Launch customer management plan	5 days	Mon 8/7/00	Fri 8/11/00	78		0%	No	Mktg/Sales Rep
81	9.1.1	Implement relationship management process	5 days	Mon 8/7/00	Fri 8/11/00			0%	No	Mktg/Sales Rep
82	9.1.2	Implement internal follow-up procedures	5 days	Mon 8/7/00	Fri 8/11/00			0%	No	Mktg/Sales Rep
83	9.2	Launch contract management plan	5 days	Mon 8/7/00	Fri 8/11/00	78		0%	No	Contract Mgr
84	9.2.1	Implement royalty tracking process	5 days	Mon 8/7/00	Fri 8/11/00			0%	No	Contract Mgr
85	9.2.2	Implement quality standard management process	5 days	Mon 8/7/00	Fri 8/11/00			0%	No	Contract Mgr
86	9.2.3	Implement IP policing	5 days	Mon 8/7/00	Fri 8/11/00			0%	No	Contract Mgr
87	9.2.4	Implement terms management process	5 days	Mon 8/7/00	Fri 8/11/00			0%	No	Contract Mgr
88	10	Close out project	5 days	Mon 8/14/00	Fri 8/18/00			0%	No	Contract Mgr
89	10.1	Perform final updates to project plan	1 day	Mon 8/14/00	Mon 8/14/00	79	80	0%	Yes	Project Lead
90	10.2	Identify lessons learned & perform follow-up activities	2 days	Tue 8/15/00	Wed 8/16/00	89	91	0%	Yes	Project Lead
91	10.3	Organize & file project plan & documentation	2 days	Thu 8/17/00	Fri 8/18/00	90		0%	Yes	Project Lead

- 3 Conduct & document client interview  
If create interview form, can eliminate tasks 1.2.1 thru 1.2.6
- 4 Gather product information  
Must include product benefits, similar products, etc.
- 5 ID tech support issues  
Type of support required? Tech transfer? Support partner? No support?
- 8 Perform initial assessment of IP issues  
Title and rights:  
1. Ownership?  
2. Protection?  
3. Possible infringement?
- 9 ID client organization decision makers  
Consider decision makers and needed officer buy-in.
- 11 Notify ~~IPMAN~~ to begin patent process  
Potential checklist/form for interview process. If form, change task to "Provide interview form (name or number) to IPMAN". This notification will trigger IPMAN to review patent status.
- 12 Make & document prelim go/no-go decision  
Potential form to doc reasons for go/no go.
- 14 Assess competitive environment  
Potential checklist or standard form for assessing comp. environment. If so, may choose to delete 2.1.1 thru 2.1.7 and change 2.1 task name to something like complete Form XXX, Competitive Environment Assessment.
- 22 ID & assess IP issues  
Expanded investigation of any ownership, protection, potential infringement issues.
- 24 Prepare market research summary  
Potential Score Card form. If so, indicate in task field.
- 25 ID decision makers  
Verify that all key decision makers are identified
- 28 Make & document product go/no go decision  
Potential form to doc reasons for go/no go.
- 29 Prioritize project opportunity or notify client of no go decision  
Create scorecard to prioritize.  
Create form letter that thanks client and notifies of status of product.
- 32 Review/update market research summary  
Potential form, Part 2 of Score Card, more market plan specific info.
- 34 Prepare PTR
- 35 No formal client interview but Product Manager will communicate with client regularly while preparing the PTR  
ID decision makers  
May require multiple client approvals. If so, add task for additional approval(s) - i.e. business unit and IT approval.  
If patent license, add task for ~~buy-in~~ approval.
- 42 ID & document customer-specific benefits  
If form or checklist, can eliminate this task. May be considered part of marketing plan.
- 43 Determine final valuation & price structure  
If form or checklist, can eliminate this task.

- 51 **Sell product**  
At this point, duplicate project plan for each target customer for the specified product.
- 52 **Make initial contact with customer(s)/sales partners**  
Must have signed PTR before initial contact with potential customer
- 53 **Obtain NDA from customer/sales partner**  
Inbound NDA for receiving information and mutual NDA also available on h: drive
- 55 **Conduct sales meeting**  
Including PowerPoint sales presentation
- 56 **ID follow-up sales activities**  
May include demos, site visits to existing customers, brochures, additional presentations, response to meeting questions...OR NOTHING!
- 58 **Finalize sales decision**  
Resource for this task is actually the customer.
- 63 **Conduct meeting to discuss deal parameters**  
Recommend use term sheet for outline of meeting agenda. See link to term sheet on task 5.10.3, Prepare term sheet.
- 68 **Negotiate and finalize contract**  
Could be multiple drafts and result in additional meetings between IPMARK and customer, includes obtaining all necessary approvals
- 71 **Prepare TR**  
If time & resources permit, Mktg/Sales rep should begin pulling together the TR in parallel with task 6.2, Negotiate & finalize contract.
- 85 **Implement quality standard management process**  
Follow up with new customer/sales partner for samples of products to check for product quality.
- 88 **Close out project**  
Project may potentially end any one of several points within project plan. Must complete close out tasks at where ever project end falls within project plan.
- 89 **Perform final updates to project plan**  
Final updates include any clean-up to project plan, e.g. review/update task durations to accurately represent time spent on project tasks. Final update helpful in accurately tracking project and project plan efficiency to allow for process improvement.
- 90 **Identify lessons learned & perform follow-up activities**  
Follow-up could include analyzing project effectiveness and updating generic plan
- 91 **Organize & file project plan & documentation**  
Final project plan should be part of project documentation. Need to develop checklist for keep/not keep documentation. May want to choose std color file for this so always identifiable. Also consider one color for project in progress and another color for project complete.

Client Interview questionnaire (task 1.2)  
(Completion Date: \_\_\_\_\_)

1. Gather product information
2. ID tech support issues
3. ID potential roadblocks
4. ID potential customers/suppliers
5. Perform initial assessment of IP issues
6. ID client organization decision makers

FIG. 197

Assess competitive environment checklist (task 2.1)  
(Duration: 4 days – Complete by: \_\_\_\_\_)

ID similar products ..... \_\_\_\_\_  
ID existing suppliers ..... \_\_\_\_\_  
ID potential suppliers ..... \_\_\_\_\_  
ID potential customer base ..... \_\_\_\_\_  
Update & expand product benefits ..... \_\_\_\_\_  
Determine market value/price..... \_\_\_\_\_

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FIG. 198

**Assess internal marketing issues checklist (task 2.2)**  
**(Addresses internal IP and Tech Support issues)**

1. ID & assess IP issues

2. ID & assess tech support issues

**FIG. 199**

INTELLECTUAL PROPERTY OUTMARKETING  
PRE-TRANSACTION REPORT

Product/Project Name:

Entity Requesting:

Contacts (Entity  
Name, Phone Numbers,  
Email):

Outmarketing Party(s)  
(Company, Address, State of  
Incorporation, Contacts, Phone  
Phone Numbers):

Intellectual Property Involved:  
(Patents, Trademarks, Trade  
Secrets, Software, etc.)

Background of Deal  
(How Deal Developed,  
Summary of  
Intellectual Property  
Functionality/Uses,  
Deal Structure):

Financial Analysis  
(Revenue to be Recognized,  
Cost Savings, etc.):

Competitive Analysis  
(Worldwide, Outside US,  
US only, Outside 9 State  
Region, etc.):

Status of Deal  
(Ready to Sign Up, Need  
Negotiation Assistance):

Anticipated Timeline  
(Initial Meeting, Demos,  
Sign Contract, etc.):

\_\_\_\_\_, a \_\_\_\_\_ Corporation subsidiary, requests IPMARK  
\_\_\_\_\_ on its behalf to enter into an intellectual property outmarketing agreement according to the above-  
described terms.

Requestor

Entity/Dept.

Title

Date

Marketing Plan checklist (task 4.1)

- ID & prioritize target customer(s)/sales partners .....
- ID & document customer-specific benefits .....
- Determine final valuation & price structure .....
- Develop channel strategy .....
- Develop IP strategy .....
- ID & develop available tech support .....
- Formalize marketing plan .....

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FIG. 201



## NONDISCLOSURE AGREEMENT

THIS NONDISCLOSURE AGREEMENT is made by and between [Name of \_\_\_\_\_ Entity], a corporation organized under the laws of \_\_\_\_\_ ("OWNER"), and \_\_\_\_\_, a corporation organized under the laws of \_\_\_\_\_ (the "Company"), effective as of \_\_\_\_\_, 20\_\_\_\_. The parties agree as follows:

1. Project Defined. The Company may receive from OWNER information of a non-public nature for use by the Company and its officers, directors, agents, employees and representatives, including financial and legal advisers (collectively "Representatives"), in the course of the performance of the Company's services for OWNER in connection with \_\_\_\_\_

\_\_\_\_\_ (the "Project").

2. Information Defined. The Company acknowledges that, in the course of its performance of services for or discussions with OWNER in connection with the Project, the Company will receive certain private and proprietary information from or about OWNER or its affiliates, including but not limited to technical, financial or business information and models, names of customers or partners; proposed business deals, reports, plans, market projections, software programs, data or any other private and proprietary information relating to the Project which may include certain trade secrets ("Information"). The term "Information" as used herein also includes: (i) the fact that the Information has been made available to or is being inspected or evaluated by the Company; (ii) the fact that the Company is providing services to OWNER or is otherwise involved in or discussing the Project; and (iii) any information, work papers, analyses, compilations, projections, studies, documents, terms, conditions, correspondence, facts or other materials derived or produced by the Company or its representatives for OWNER in connection with the Project. Any Information supplied by OWNER to the Company prior to the execution of this Agreement shall be subject to the same treatment as the Information made available after the execution of this Agreement.

3. Exclusions from Definition. The term "Information" as used herein does not include any data or information that: (a) is already known to the Company at the time it is disclosed to the Company; or (b) before being divulged by the Company: (i) has become generally known to the public through no wrongful act of the Company or its representatives; (ii) has been rightfully received by the Company from a third party without restriction on disclosure and without a breach of an obligation of confidentiality

PRIVATE/PROPRIETARY/LOCK

running directly or indirectly to *OWNER*; (iii) has been approved for release by a written authorization by *OWNER*; or (iv) is independently developed by the Company without use, directly or indirectly, of the Information received from *OWNER*.

4. Nondisclosure Obligation. The Company shall keep the Information confidential and shall not disclose such Information, in whole or in part, to any person other than its Representatives who need to know such Information in connection with the Company's performance of services for *OWNER* in connection with the Project except with the prior written consent of *OWNER* or as otherwise permitted hereunder. Such Representatives shall be informed by the Company of the confidential nature of the Information and shall be required by the Company to agree in writing to be bound by this Agreement. The Information shall be used by the Company solely for the purpose of performing services for or otherwise evaluating the information provided by *OWNER* in connection with the Project, and shall not be otherwise used for the Company's own benefit or for any purpose detrimental to the interests of

5. Standard of Protection. For the purpose of complying with the obligations set forth herein, the Company shall use efforts commensurate with those that it employs for the protection of corresponding sensitive information of its own, which shall in any event be no lesser a standard than the type of efforts that would be taken by a reasonable business for the protection of its own highly confidential information and trade secrets.

6. Compliance with Legal Process. In the event that the Company is legally requested or required (by oral questions, interrogatories, requests for information or documents, subpoena, Civil Investigative Demand or similar process or, in the opinion of counsel for the Company, by federal or state securities or other statutes, regulations or laws) to disclose any Information, the Company shall promptly notify *OWNER* of such request or requirement prior to disclosure so that *OWNER* may seek an appropriate protective order and/or waive compliance with the terms of this Agreement.

7. Ownership; Return of Information. All Information (including tangible copies and computerized or electronic versions and summaries thereof) shall remain the property of *OWNER*. Within ten (10) days following the receipt of a written request from *OWNER*, the Company shall deliver to *OWNER* all tangible materials containing or embodying the Information received from *OWNER*, together with a certificate executed by an officer of the Company certifying that all such materials in the Company's possession or control have been delivered to *OWNER* or destroyed. The Company shall not assert directly or indirectly any right with respect to the Information which may impair or be adverse to *OWNER*'s ownership thereof.

PRIVATE/PROPRIETARY/LOCK

8. Remedies for Breach. The Company understands and agrees that money damages would not be a sufficient remedy for any breach of this Agreement and that **OWNER** shall be entitled to seek injunctive or other equitable relief to remedy or forestall any such breach or threatened breach. Such remedy shall not be deemed to be the exclusive remedy for any breach of this Agreement, but shall be in addition to all other rights and remedies available at law or in equity.

9. No Representations or Further Obligations. Neither this Agreement nor the disclosure of Information shall constitute or imply any promise or intention to make any purchase of services by **OWNER**. None of the Information which may be disclosed by **OWNER** shall constitute any representation, warranty, assurance, guarantee or inducement by **OWNER** to the Company of any kind, and in particular, with respect to the accuracy or completeness of any Information or the non-infringement of trademarks, patents, copyrights, mask protection rights or any other intellectual property rights, or other rights of third persons. It is understood that this Agreement does not obligate **OWNER** to enter into any further agreements or to proceed with any possible relationship or other transaction.

10. Term; Termination. This Agreement shall terminate as to the exchange of any new Information three (3) years after the effective date hereof. Either party may terminate the exchange of Information under this Agreement at any time by written notice to the other specifically referencing this Agreement. In any event, however, the obligations of the Company to maintain the confidentiality of the Information it has received under this Agreement shall continue for a period of three (3) years after such termination and then terminate; provided, however, that such obligation shall continue indefinitely as to Information constituting a trade secret under applicable law for so long as such Information remains a trade secret.

11. No Waiver. No failure or delay by **OWNER** in exercising any right, power or privilege hereunder shall operate as a waiver thereof, nor shall any single or partial exercise thereof preclude any other or further exercise thereof or the exercise of any other right, power or privilege hereunder.

12. Amendment. This Agreement may not be modified, supplemented or amended orally, but only by a writing signed by both parties hereto.

13. Applicability to Associated Parties. Any information disclosed to the Company by any of **OWNER**'s affiliated companies or by any company, person or other entity participating with **OWNER** in any consortium, partnership, joint venture or

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similar business combination in connection with the Project, which would otherwise constitute Information hereunder if disclosed by *OWNER*, shall be deemed to constitute Information under this Agreement, and the rights of *OWNER* under this Agreement may be enforced by any such affiliate or other entity in addition to with respect to any violation relating to the Information disclosed by such affiliate or other entity, as if such entity were also a party to this Agreement.

14. Governing Law. This Agreement shall be governed by and construed and enforced in accordance with the laws of the State of \_\_\_\_\_, without regard to its choice of law provisions.

IN WITNESS WHEREOF, the parties have executed and delivered this Nondisclosure Agreement effective as of the date first written above.

*OWNER*:

Company:

By: \_\_\_\_\_

By: \_\_\_\_\_

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Title: \_\_\_\_\_

PRIVATE/PROPRIETARY/LOCK

Product Name

## License Agreement Term Sheet

- Definitions  
What is licensed?
- Specs of the Software (exhibit)  
Definition/description?
- Delivery, testing and acceptance  
How should this work?
- Grant and Scope of License  
Exclusive? Non-exclusive? Etc.?
- Term and Limitations on Use and reproduction  
What can partnership do with it?
- Sublicensing and transfer limitations
- Pricing Terms  
Royalties? Buy? Savings?
- Acct and audit rights  
As stated in the partnership agmt?
- Sales and Property tax liability  
Who liable?
- Trade secret protection/Confidentiality terms  
Need to be strict. In what manner may disclosure be made to vendors, particularly STB mfts?

FIG. 206

- Title to original software and owner infringement reps  
Positive stmt of ownership –will we indemnify the partnership?
- Ownership of mods enhancement and additions  
Who owns?
- Source code inclusion/exclusion and protection  
Must source be disclosed to partnership?
- Training and documentation req's  
Any?
- Protection of Trademarks  
Partnership must honor <sup>OWNER'S</sup> marks
- SW maintenance and technical support obligations
- Vendor warranty obligations and scope
- Limitation of liability and types of damages
- Vendor indemnity and obligations in event of infringement
- Dispute resolution provisions
- Insurance terms (vendor on site?)
- Assignment limitations
- Std boilerplate (merger, written agmt, force majeure, etc)

FIG. 207

**INTELLECTUAL PROPERTY OUTMARKETING  
TRANSACTION REPORT**

**INTELLECTUAL PROPERTY INVOLVED:**

**OUTMARKETING PARTY:**

**BUSINESS DEAL CONTACTS:**

**INTELLECTUAL PROPERTY CONTACTS:**

**ESTIMATED VALUE:**

Up Front Savings  
Revenues (Years) = \_\_\_\_\_

**I. Executive Summary**

**II. Background**

**FIG. 208**

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FOBT-50-0ET05260

### **III. Deal Structure**

### **IV. Financial Analysis**

### **V. Competitive Analysis**

(1) Customers:

(2) Territory:

(3) Standardization:

**FIG. 209**



**VI. Recommendation**

**BUSINESS APPROVAL**

**LEGAL APPROVAL**

Signature:

\_\_\_\_\_

\_\_\_\_\_

Printed Name:

\_\_\_\_\_

\_\_\_\_\_

Title:

\_\_\_\_\_

\_\_\_\_\_

Entity:

\_\_\_\_\_

\_\_\_\_\_

Date:

\_\_\_\_\_

\_\_\_\_\_

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Mktg Analyst \_\_\_\_\_ Mktg/Sales Rep \_\_\_\_\_

1. All updates in MS Project are made at the sub-task level only.
2. In the Task # field, enter the # of the task being updated or "new" if adding a task.
3. Find the column for the field you wish to update for the task and enter update information in the space provided.
4. Use the following guidelines for updating fields in MS Project:
  - Start/Finish Date - Change the duration of the appropriate task(s) to arrive at the new start/finish date
  - % Complete - Enter the new % complete for the task(s), either manually or using the up/down arrows
  - Deliverable - Change deliverable field to Yes, either manually or using the option in the drop down box

Task #	Start Date	Finish Date	% Comp	Del	Add/Delete Task (incl. info for all project fields)
--------	------------	-------------	--------	-----	---

FIG. 211

# Opportunity Score Card

Scoring Date: _____	Scorer Initials: _____	<b>Total Score:</b>
Product/Project Name _____		
Business Unit _____		
Business Unit Primary Contact:		IPMARK Primary Contact:
Name _____		Name _____
Phone _____		Phone _____

Score Card Key Factors	Scoring & Explanation
<b>1. MARKET POTENTIAL</b> <ul style="list-style-type: none"> <li>- Product viability (i.e. unique product, benefits, support/maintenance?)</li> <li>- Potential customers?</li> <li>- Few competitive products/suppliers?</li> <li>- Large market, low market saturation?</li> </ul> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div> <b>High</b>            Potential -----            10 9 8 7 6 5 4 3 2 1         </div> <div> <b>Low</b>            Potential -----            10 9 8 7 6 5 4 3 2 1         </div> </div>	<div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: 80%;">Market Potential Rating</div>
<b>2. PROJECT TIMEFRAME</b> <ul style="list-style-type: none"> <li>- Product developed &amp; ready to market?</li> <li>- Ownership? Patent status?</li> <li>- Identified interested parties?</li> <li>- Deal simple or complex?</li> <li>- Anticipated time to sell/close/recognize \$?</li> </ul> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div> <b>Today</b> ---- 6 ---- 12 ---- 18+ mths            10 9 8 7 6 5 4 3 2 1         </div> </div>	<div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: 80%;">Project Timeframe Rating</div>
<b>3. PROJECTED REVENUE POTENTIAL</b> <ul style="list-style-type: none"> <li>- Anticipated total revenue from project? (if no strong customers, use 1X value)</li> </ul> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div> <b>Over</b>            5M -- 4M ---- 1M ----- 100K            10 9 8 7 6 5 4 3 2 1         </div> <div> <b>Under</b>            10 9 8 7 6 5 4 3 2 1         </div> </div>	<div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: 80%;">Revenue Potential Rating</div>
<b>4. COMPETITIVE THREAT TO BELLSOUTH</b> <ul style="list-style-type: none"> <li>- Sale give customer competitive advantage over BellSouth?</li> </ul> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div> <b>No</b>            Threat -----            10 9 8 7 6 5 4 3 2 1         </div> <div> <b>High</b>            Threat -----            10 9 8 7 6 5 4 3 2 1         </div> </div>	<div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: 80%;">Competitive Threat Rating</div>
<b>5. INTANGIBLE VALUE</b> <ul style="list-style-type: none"> <li>- Set stage for future big \$ deals?</li> <li>- Build/foster relationship w/ existing/future customer?</li> <li>- Officer request/interest?</li> <li>- Public relations opportunity?</li> </ul> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div> <b>High</b>            Profile -----            10 9 8 7 6 5 4 3 2 1         </div> <div> <b>Low</b>            Profile -----            10 9 8 7 6 5 4 3 2 1         </div> </div>	<div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: 80%;">Intangible Value Rating</div>
<b>TOTAL SCORE:</b>	

FIG. 212

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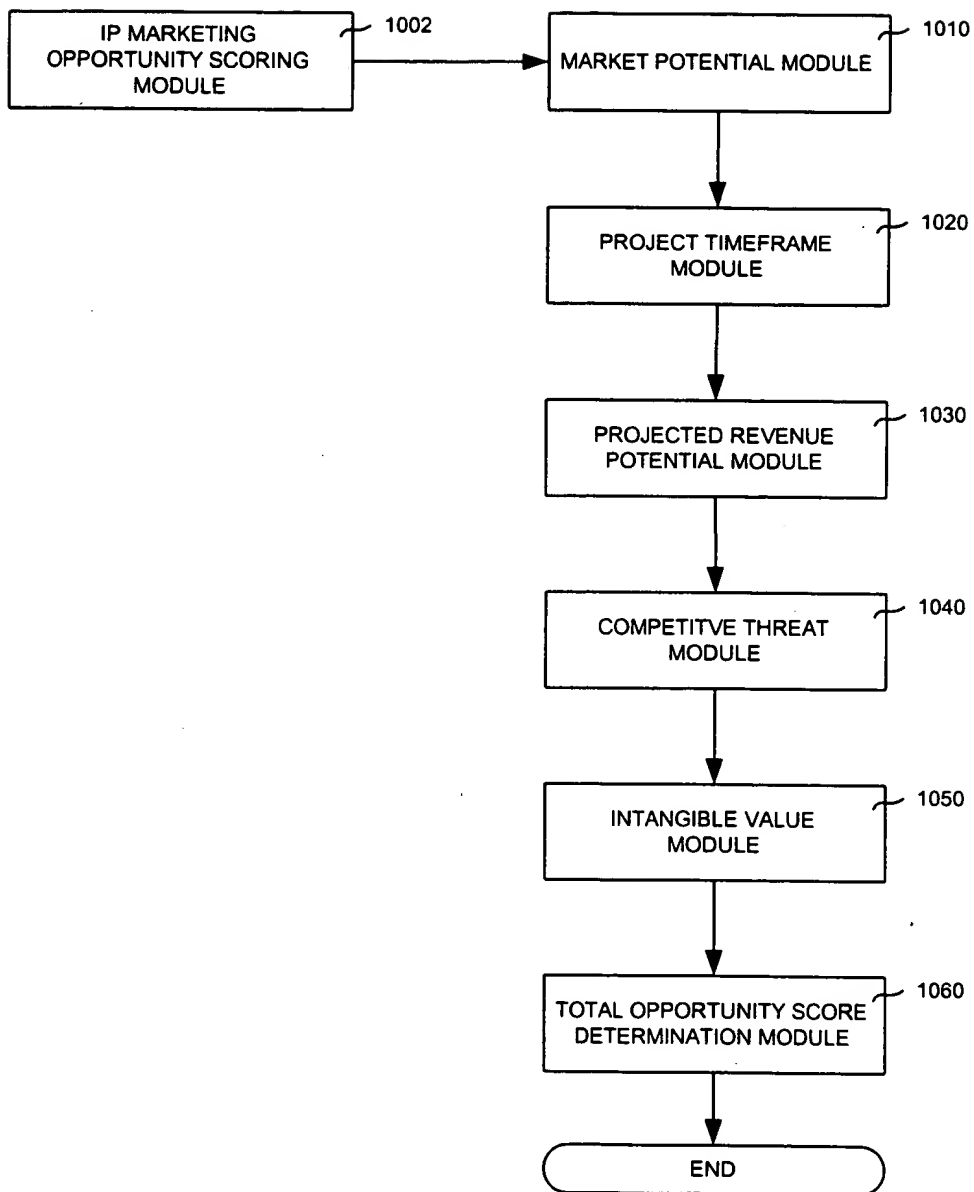
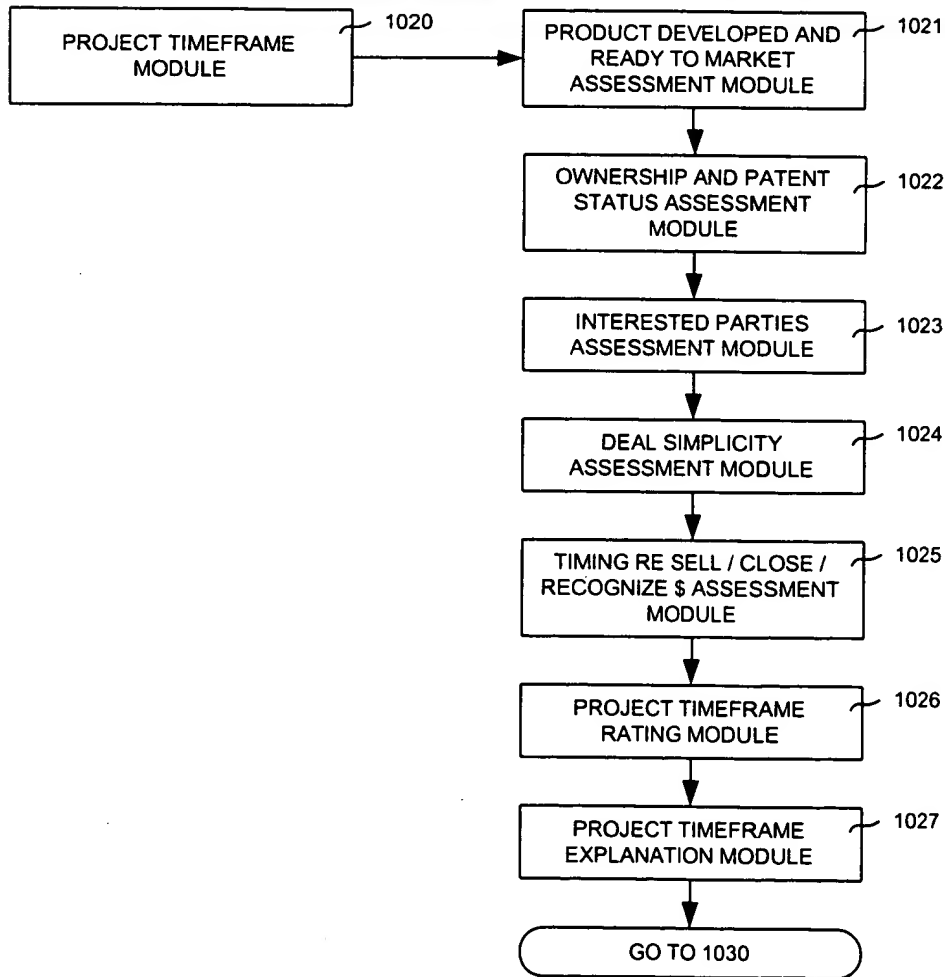
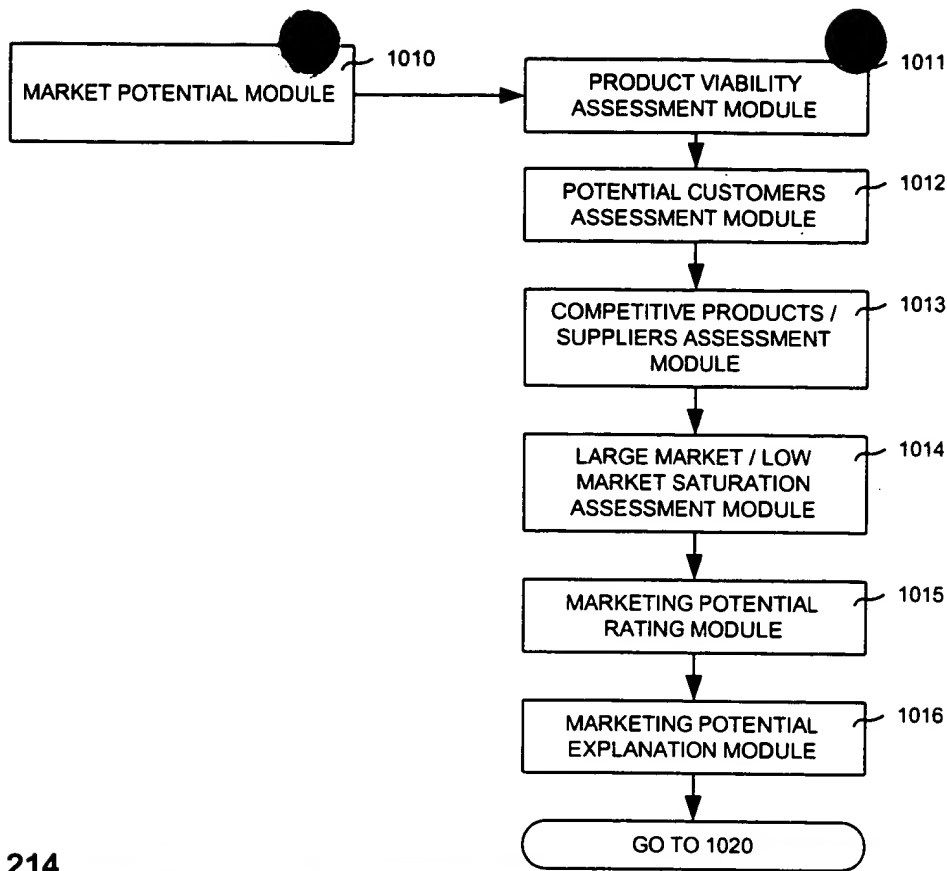


FIG. 213



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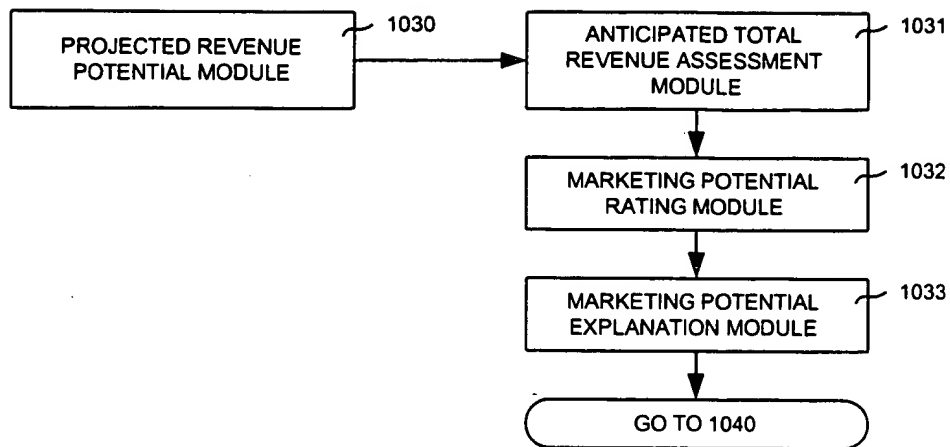


FIG. 216

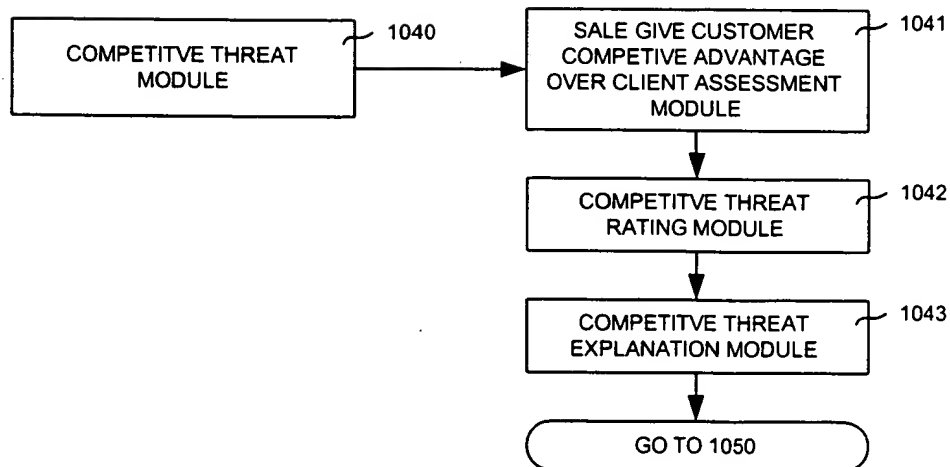


FIG. 217

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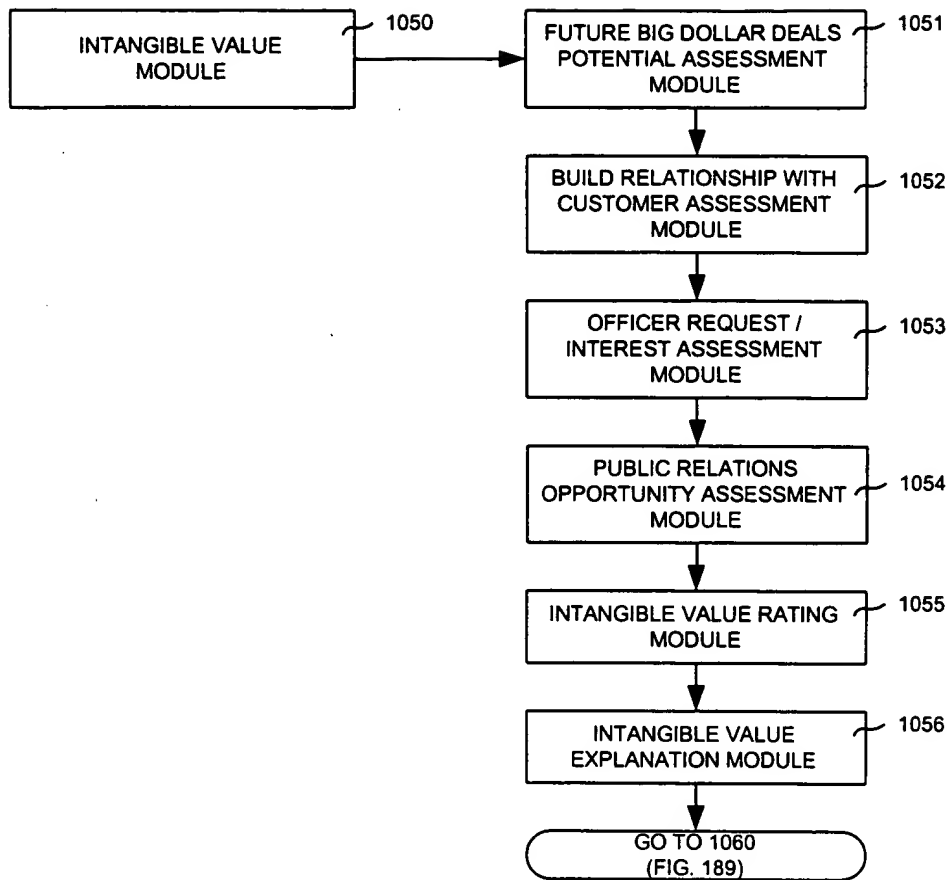
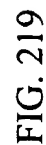


FIG. 218





# >>> Company Intellectual Property>>

## >> 10 Step Checklist

### ✓ Patents

- ☐ Work produced by Company employees or with Company resources has been assessed for patentability if, at least one of the following occurred:
  - ⇒ Development of a new product, feature, process or software that seems unique
  - ⇒ Improvements to existing technology, product, process, or software
  - ⇒ Results that cut costs and/or improve efficiency
  - ⇒ Creation of a new business method

*It is critical that employees bring their inventions to the attention of the Director of Technology (404) xxx-xxxx or the Technology Asset Manager (404) xxx-xxxx as soon as possible, and especially before any public disclosure of the invention!*

### ✓ Proprietary Information

- ☐ All proprietary information has been physically marked by its originator at the bottom center margin using the approved markings.
- ☐ All proprietary information has been securely stored and properly disposed.
- ☐ An NDA or IEA has been executed due to the necessity of sharing Company proprietary information in order to discuss or negotiate a potential business relationship, and:
  - ⇒ only the minimum amount of proprietary information necessary to facilitate our business purposes has been shared or received; and
  - ⇒ any necessary patent applications have been filed prior to such disclosures.

*Any questions regarding proprietary information should be brought to the attention of the Director of Administration (404) xxx-xxxx.*

### ✓ Trademarks

- ☐ The Company mark and subbrands have been used in accordance with the company's graphics standards to ensure that the significant value of the mark is not diluted.
- ☐ All subbrands have been cleared by the Director of Trademarks.
- ☐ All third party (such as agents, distributors, co-brand parties, and sponsored parties) use of Company's trademarks have been authorized in writing using language approved by Company Intellectual Property Marketing Corp.

*Any questions regarding Graphics and Sponsorships should be brought to the attention of the Director of Corporate Identity (404) xxx-xxxx and other Trademark questions should be directed to the Director of Trademarks (404) xxx-xxxx.*

### Ownership

- ☐ Before any development work to be done by an outside vendor (such as software, training courses or advertising) is begun, a specific written contract has been executed ensuring that Company will be the owner of the intellectual property rights in the developed technology, or work of authorship. (see Executive Directive 12).

*Any questions regarding Ownership should be brought to the attention of the Vice President of Company Intellectual Property Management Corporation (404) xxx-xxxx.*

### ✓ Copyrights

- ☐ Every Company work product created by an employee or by a vendor under a "work made for hire" contract have been properly marked with a copyright notice.

It is not necessary to register the copyright in order to place the copyright notice on the work.

*Any questions regarding Copyrights should be brought to the attention of the Director of Administration (404) xxx-xxxx.*

### Marketing

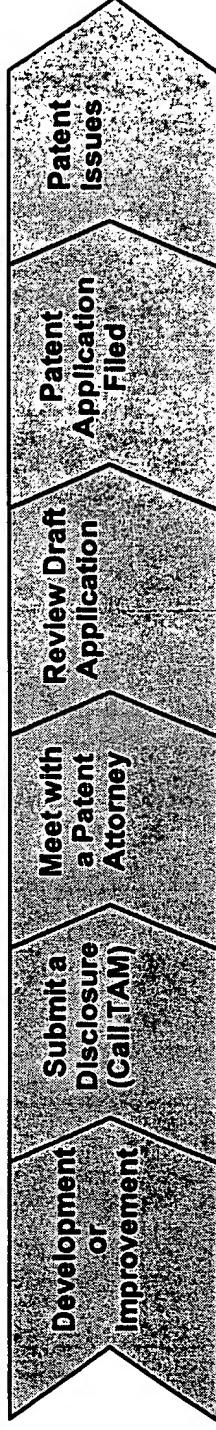
Company's policy is to maximize the value from its intellectual property.

- ☐ Opportunities to outmarket Company technology, software, systems, processes or other intellectual property to another company have been identified.

*Any marketing opportunities should be brought to the attention of the Vice President of Company Intellectual Property Marketing Corporation (404) xxx-xxxx.*

# Patent Process Life Cycle

Patent Timeline:



**Task :**

- Developments or Improvements created by company
- Employees or with company resources should be brought to IP Protection's attention
- Review for technical merit
- Initial marketing potential analyzed
- Administrative procedures addressed
- Disclose:
  - State of industry will prepare at least 1 draft application
  - Sufficient detail such that someone of your expertise could replicate the invention
- Outside attorney reviews draft & provides comments

**Time Frame:**

- We have 1 year from the time an invention is publicly used or disclosed in which to seek US patent protection
- 2-8 weeks for disclosure preparation for Outside Attorney
- Mtg: 1.5 - 2 hrs
- Mtg scheduled 1-2 wks in advance
- Outside attorneys are flown in for mtg
- Attorney Prep: 6-8 weeks
- Inventor given 2 weeks to review & return to IP Protection
- 4 Weeks to receive official filing notice from the US Patent Office
- 12-18 months

**Innovation Award:**

- Receive a Disclosure Gift

**Achievement Award:**

- Each inventor receives \$2000
- If this is an inventor's 5th company patent, he/she will receive an additional \$2500
- 10th Issued Company Patent: Additional \$5000
- >14th Issued Company Patent: Nominated for General Award

FIG. 221



# Innovations

## What's Patentable?

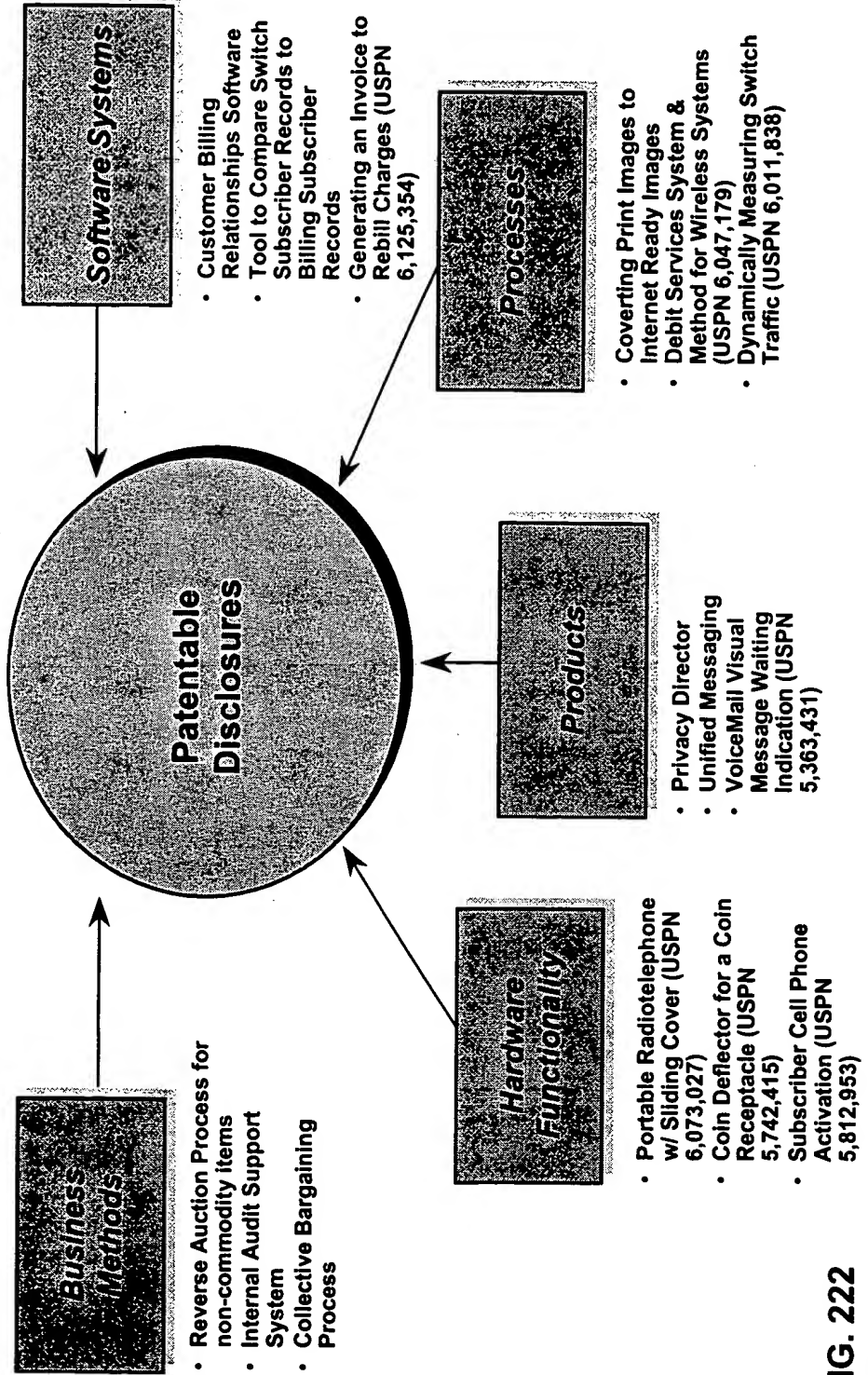


FIG. 222

## Internal Auditor

### *Inventor*

- **Identify innovations within your organization:**

- Developed or improved a process or service?
- Created a method of doing business?
- Improved efficiency or cut costs?

- **Innovation:**

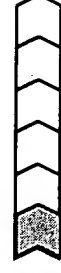
- Developments or improvements by you, the employee or
- Developments or improvements created with resources

### *IP Ambassador*

- **Raising Awareness of Intellectual Property:**

- Assist in the education of employees
- Identify intellectual property risks to business objectives
- Identify intellectual property controls to those risks
- Where appropriate, suggest IP inclusion to organizations modifying their business process.

FIG. 223



# Internal Audit & the Checklist

## Sample Business Process

### Business Objectives

Transition Product to Trial Testing

Integrate Product w/ Current Service Offerings

Product to Market by Goal

Produce Savings

Decrease employee turnover ratio

### Potential Risks

- Delay in contract negotiations
- Vendor's architecture incompatible
- Contract Disputes
- Project delayed by missed deadlines
- Unable to market product as intended due to Trademark Issues
- Increased development al costs
- Product released to <50% of Market in 2001
- Costly Overhead
- Employee Incentive Programs too costly
- Access to Senior Mgt too bureaucratic
- Limited Budget for Salary Increases

### Controls

- Seek Patent Protection early
- Ensure proprietary info properly marked
- Ensure Ownership
- Seek Patent Protection
- Ensure Proprietary Markings
- Contact Trademark & Corporate Identity Directors early in Process
- Identify outmarket opportunities
- Encourage innovation through the Innovation Awards Program

***As an internal auditor, you can help educate the organization on the importance of intellectual property.***

FIG. 224

# 90% of All Revenues Are Credited towards the Entity That Owns the IP Asset

*Product licensing is a simple process:*

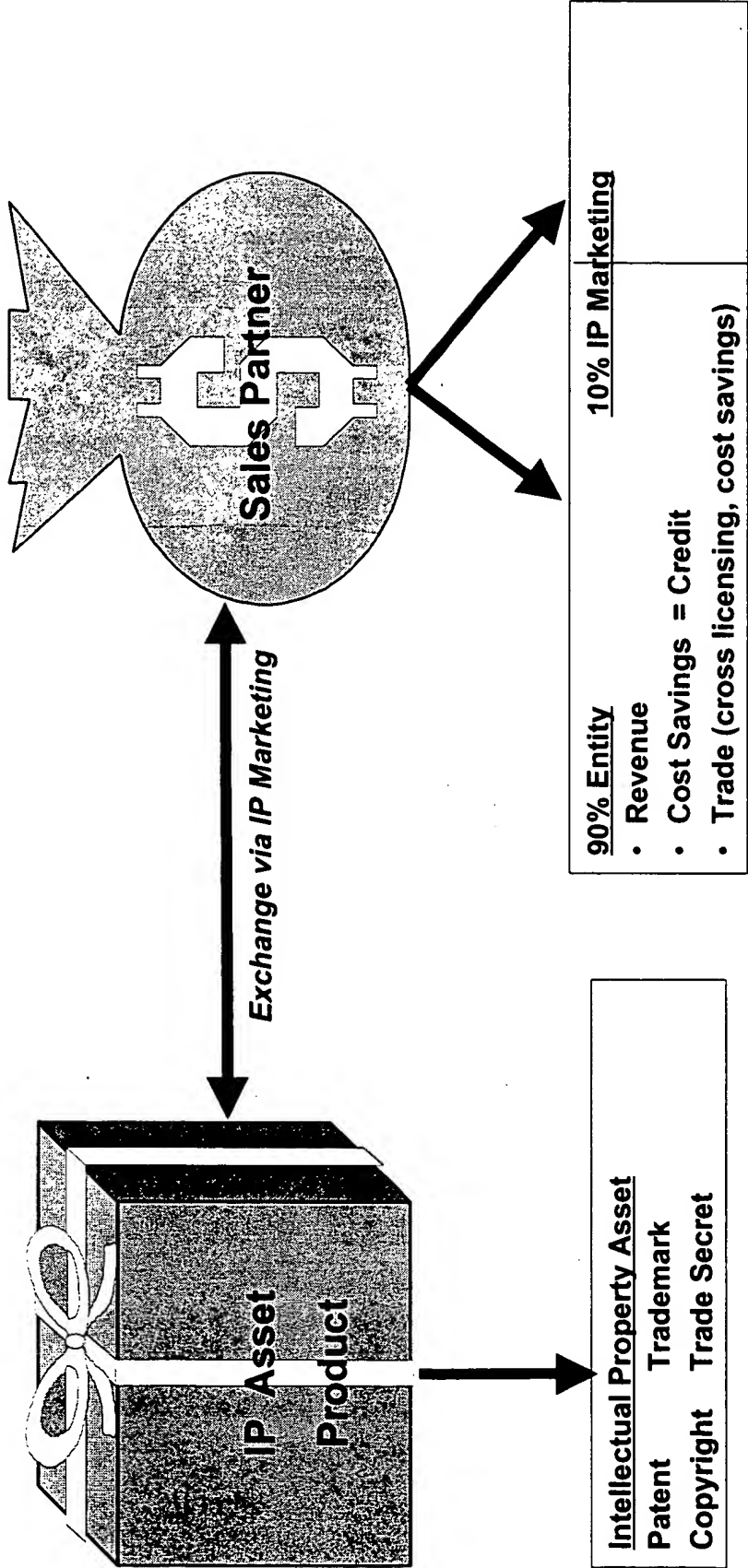


FIG. 225

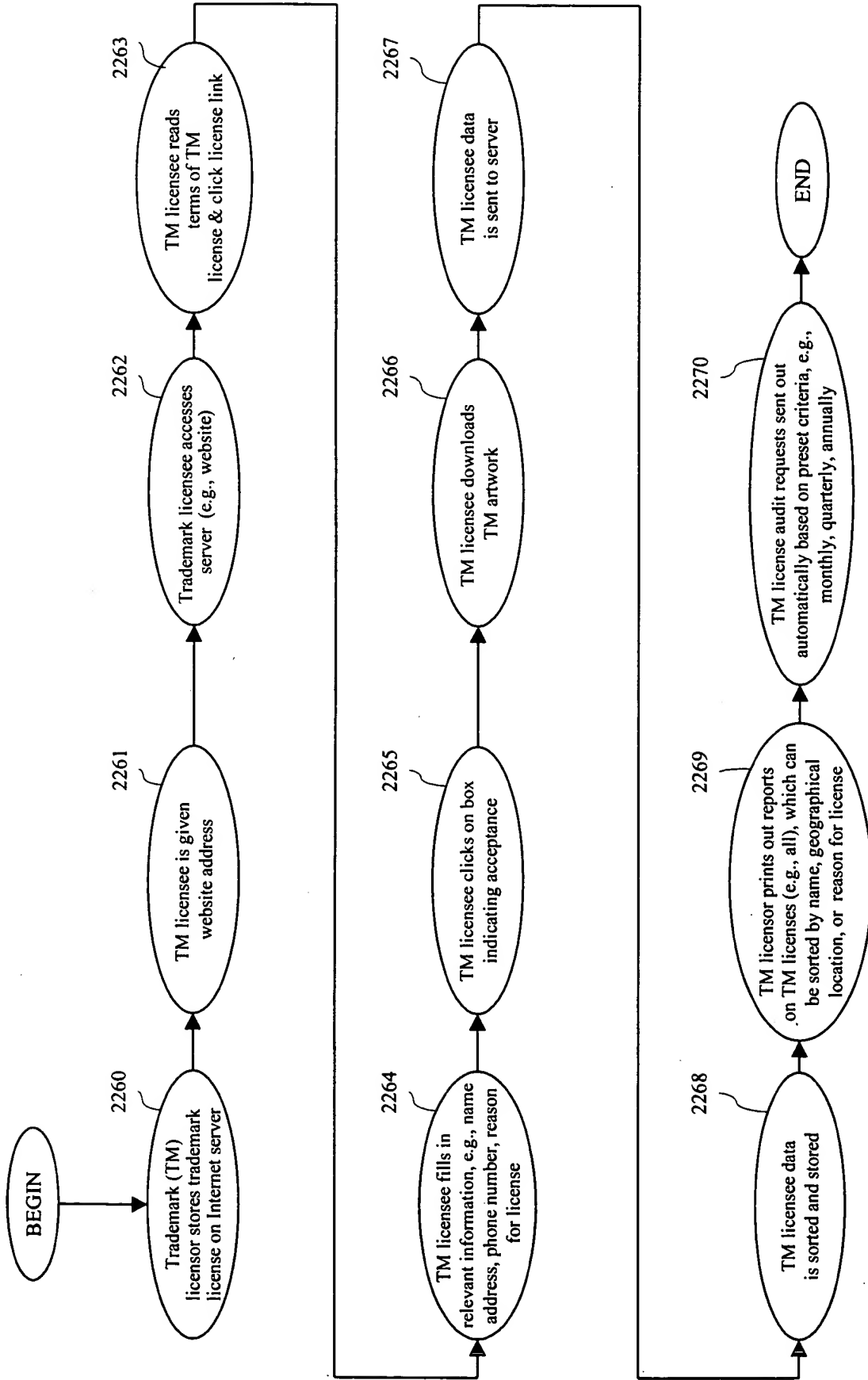


FIG. 226